Oracle® Business Approvals for Managers

User Guide

Release 1.0

Part No. E13887-01

November 2008

ORACLE

Oracle Business Approvals for Managers User Guide Release 1.0

Part No. E13887-01

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Overview

This chapter includes the following topics:

- About Oracle Business Approvals for Managers
- Product Licensing

About Oracle Business Approvals for Managers

Oracle Business Approvals for Managers (hereafter referred to as Managers) delivers targeted and task-oriented information to help managers make informed decisions and take action immediately and securely from their iPhones.

Oracle Business Approvals for Managers enables you to evaluate, request more information, approve, or reject Oracle E-Business Suite (EBS) requests related to:

- Expense reports
- Human resources job offers
- Human resources vacancies
- Purchase order requisitions

Optionally, you can set up Managers to retrieve custom reports related to the type of approval that you are reviewing. This configuration retrieves data from Oracle Business Intelligence Enterprise Edition Plus (OBIEE) or Oracle Business Intelligence Applications.

The security and performance of the application are enhanced with the support of SSL encryption protocol and optionally Oracle's Identity Management.

Product Licensing

To download the application on the iPhone, you must agree to the terms of the Oracle Business Approvals for Managers license agreement. You can access the license agreement when you download the application.

In addition, Oracle Business Approvals for Managers requires the licensing of a server product called Oracle Business Approvals Connector for Managers. This connector provides secure and robust integration with Oracle E-Business Suite

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applications using Oracle SOA Suite and optional OBIEE technologies. Oracle Business Approvals Connector for Managers can be licensed directly from Oracle.

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Setting Up Managers

This chapter includes the following topics:

- Prerequisites
- Configuring Managers Application Settings
- Configuring Access to OBIEE Analytics (Optional)

Prerequisites

Before you can configure Oracle Business Approvals for Managers, a system administrator must:

- Install the Oracle Business Approvals Connector for Managers.
- Configure the SOA Suite to interact with the application.

  See the Oracle Business Approvals Connector for Managers Configuration Guide.

Configuring Managers Application Settings

The application settings for Managers include BPEL settings, worklist type settings, and an option to enable debugging.

BPEL Settings for the Server

The BPEL settings include the endpoint URL to the server that provides the interaction with Oracle EBS and login credentials that you use to access Oracle EBS. The endpoint URL is a site specific location and should be provided by your system administrator.

Worklist Type Settings

Managers supports multiple worklist types, including Expense Reports, Purchase Requisitions, HR Offers, and HR Vacancies. You cannot access a worklist unless you have enabled one or more worklist types in the application settings. In addition, you can enable only the worklist types to which you have been given access by your system administrator.

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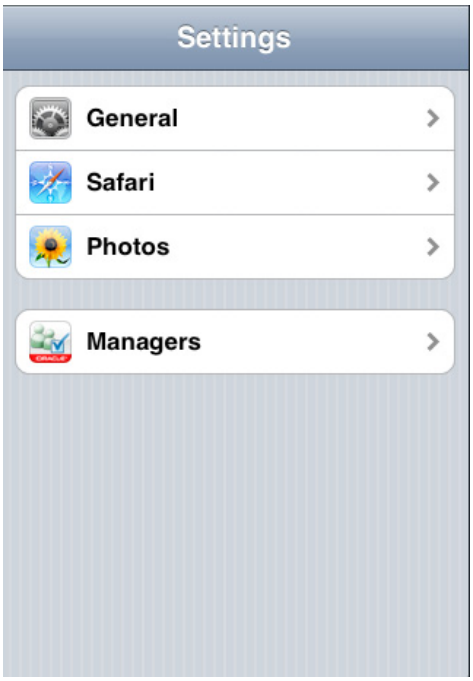
System Setting

When enabled, the Debug system setting provides detailed logging that you can use to troubleshoot connectivity or other issues. Oracle recommends that you disable the Debug setting when not troubleshooting the application.

Note: The application settings also contain an Analytics Settings section. These settings are optional and enable users to access OBIEE analytic reports and view them directly from Managers. See "Configuring Access to OBIEE Analytics" in this guide for more information.

To configure Managers application settings:

1. On the iPhone, tap the Settings button.



Settings Menu.

2. On the Settings page, tap Managers.

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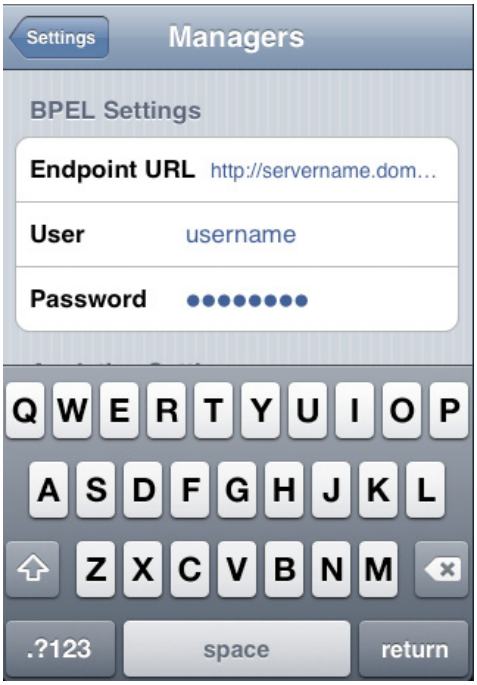

Managers – BPEL Settings.

3. In the BPEL Settings section, tap the Endpoint URL field and enter a URL in this format:

   http://*servername.domain.com*:*port*/orabpel/*domain*

   Note: If the access uses a secure sockets layer (SSL) protocol, then the URL will begin with https.

   This table provides a description of each variable in the URL:

Variable	Description
servername.domain.com	The name of the server machine on which the web services are deployed. This may be a short name (servername), a fully qualified name (servername.domain.com), or an IP address (for example, 10.0.1.251).
port	The TCP/IP port on which the web services are listening. If the web services have been deployed on the default HTTP port 80 this may be omitted, as in this example: `http://server.domain.com/orabpel/domain` If HTTPS (SSL) is being used and the services have been deployed on the default HTTPS port 443 the URL will look like `https://server.domain.com/orabpel/domain`.

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	Otherwise the URL will contain the port used, for example if the web services are using HTTPS listening on port 8080 the url would be `https://server.domain.com:8080/orabpel/domain`
domain	The name of the BPEL domain on which the web services are deployed. BPEL is configured with a default domain using the name "default," as in this example: http://*server.domain.com*:*port*/orabpel/default If the services were deployed to an alternate domain, use the name of that domain instead.

4. Enter your sign-on credentials in the following fields:

Field	Value
User	Enter the same user name that you use to access Oracle EBS.
Password	Enter the password associated with your user name.

5. Scroll down to the Worklist Types section.

Managers – Worklist Types.

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6. In the Worklist Types section, for each worklist type that you wish to enable, slide the switch to ON.

   You must select at least one worklist type for the application to function properly.

7. For the Debug setting, slide the switch to ON to enable logging.

   By default, the Debug option is not enabled (OFF).

Configuring Access to OBIEE Analytics (Optional)

This section includes an overview and the following topics:

- Considerations for Viewing Charts on the Mobile Device
- Setting Up Analytics in OBIEE for Managers
- Configuring Managers to Access OBIEE Analytics
- Passing Context

Overview

The Analytics Settings in Managers enable access to analytic reports in OBIEE. In OBIEE, you can create a custom set of reports and associate them with a worklist in Managers.

Considerations for Viewing Charts on the Mobile Device

The iPhone device does not currently support Flash components in Web pages. To enable viewing charts on the mobile device, you must configure the OBIEE server to display charts using the PNG graphic format. The PNG format is a simple graphics format and does not support all the interactivity provided by the Flash or SVG formats.

To enable PNG rendering, add the following to the <ServerInstance> section of the instanceconfig.xml file:

```
<Charts>
      <DefaultImageType>PNG</DefaultImageType>
</Charts>
```

The instanceconfig.xml file is located in this directory:

\\DATADIR\web\config

In addition, Oracle recommends that you install and configure a second presentation server for serving content specifically to mobile devices so that PNG chart rendering applies only to mobile devices.

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Setting Up Analytics in OBIEE for Managers

On the OBIEE Web client, use Manage Catalog to associate new or existing analytic reports to a worklist type in Managers. You can place analytic reports in subfolders in either of these locations:

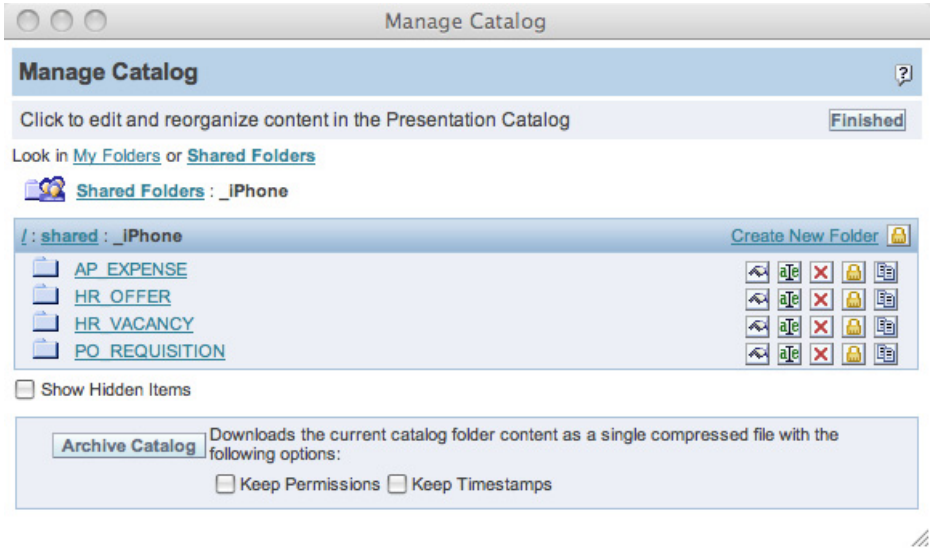
- My Folders – Contains analytic reports that only you can access.
- Shared Folders – Contains analytic reports that users with the appropriate permissions can access.

In My Folders or Shared Folders, you create a new folder named _iPhone, and then create subfolders based on the approval type with which you want to associate analytic reports. The subfolders that you set up for Managers are case sensitive. The folder names are hard coded and must be named exactly as shown in this table:

Folder Name	Approval Type
AP_EXPENSE	Expense Reports
HR_OFFER	HR Job Offers
HR_VACANCY	HR Job Vacancies
PO_REQUISITION	Purchase Order Requisitions

Each analytic report contained in one of these subfolders, such as PO_REQUISITION, appears as an available report in the Managers application on the iPhone. Any subfolders and items contained within them are not available in the Managers application; these items typically include saved reports or symbolic links to reports located elsewhere in the repository.

This is an example of the folder configuration in the OBIEE Manage Catalog for Managers:



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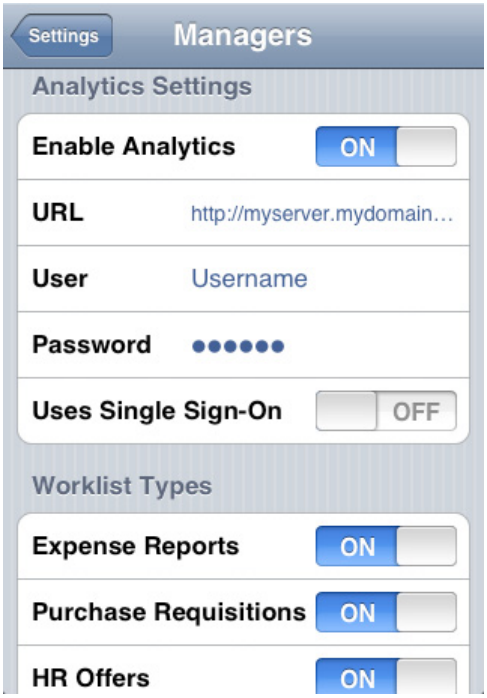
OBIEE Manage Catalog – Folders for storing reports for Managers application

Configuring Managers to Access OBIEE Analytics

Configure Managers application settings on the iPhone to enable access to reports in OBIEE.

To configure Managers to access OBIEE analytics:

1. On the iPhone, tap the Settings button.
2. On the Settings page, tap Managers.



Managers – Analytics Settings

3. In the Analytics Settings section, slide the Enable Analytics switch to ON.
4. Tap the Endpoint URL field and enter a URL to access the OBIEE server, as in this example:

   `http://servername.domain.com:port/analytics`

   Note: If the web services are accessed over a secure sockets layer (SSL) protocol, then the URL will begin with https.

   This table provides a description for each variable in the URL:

Variable	Description
servername.domain.com	The name of the server machine on which the OBIEE server is running.

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	This may be either a short name (servername), a fully qualified name (servername.domain.com), or an IP address (10.0.1.251).
port	The TCP/IP port on which the OBIEE server is listening. If the OBIEE server has been deployed on the default HTTP port 80 this may be omitted, as in this example: http://server.domain.com/analytics If HTTPS (SSL) is being used and the OBIEE server has been deployed on the default HTTPS port 443 the URL will look like: https://server.domain.com/analytics Otherwise the URL will contain the port used, for example if the OBIEE server is using HTTPS listening on port 8080 the url would be: https://server.domain.com:8080/analytics

5. Enter your sign-on credentials in the following fields:

Field	Value
User	Enter the same user name that you use to access the OBIEE server through the desktop.
Password	Enter the password associated with your OBIEE server user name.

Note: The user and password values might be case sensitive, so ensure that you enter them exactly as you would when logging in through the browser client.

6. If the server uses Oracle Single Sign-On, then slide the Uses Single Sign-On switch to ON.

   When enabled, the application uses Oracle SSO to authenticate the user.

Passing Context

Oracle Business Approvals for Managers supports passing context from the iPhone to the OBIEE server. Passing context provides more relevant analytics for the approval being viewed. Any of the header fields for an approval, as shown in this example, can be passed to OBIEE:

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Worklist Details – Header Information

Context passing works in a similar manner as presentation variables with some minor differences. When an analytic report is accessed, Managers performs the following tasks:

- Retrieves the report definition (XML) for the report.
- Iterates through each of the header fields of the approval being viewed. Each header field is identified with a key string. If the report contains one or more instances of the string @{key}, the actual value is substituted for this placeholder.

The modified report is submitted to the OBIEE server and the results are displayed on the mobile device.

An example of context passing and a list of available keys for each approval type is provided in "Appendix B: Additional Information about Context Passing" in this guide.

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Using Managers

This chapter includes an overview and the following topics:

- Viewing Worklists
- Requesting More Information
- Approving Items in a Worklist
- Rejecting Items in a Worklist
- Viewing Related Analytic Reports (Optional)

Overview

The Managers application on the iPhone enables you to view, approve, or reject approval requests related to the following tasks in Oracle EBS:

- Expense reports
- Human resources vacancies
- Human resources job offers
- Purchase order requisitions

Managers stores and categorizes approval requests in worklists. The approval requests are also referred to as worklist items.

For each item awaiting approval in a worklist, Manager provides additional information, including detail lines and any available historical information. If you need more information than is available to determine whether to approve or reject the worklist item, you can submit a request for more information from the person who submitted the item for approval.

In addition, when you approve or reject a worklist item, you can add a comment about the reason for your decision.

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Viewing Worklists

Managers enables you to sort worklists by:

- Category

  By default, worklist items are grouped by worklist type or by category. The categories displayed depend on the worklist types that you enabled in the application settings. For example, if you enabled Expense Reports and Human Resources Job Offers, the Worklist page displays items awaiting your approval for these two categories.

- Start Date

  You can change the display to view all worklist items by their start dates.

- Due Date

  You can change the display to view all worklist items by their due dates.

- Closed

  You can view worklist items that have been previously approved or rejected.

After you select an item in the worklist, Managers displays more information about the item, such as:

- Details lines

  The details lines provide information about the items contained within the approval, for example for an expense report, the detail lines contain each item entered in the expense report.

- History

  History provides information about the past activity of a worklist item, for example the timestamp and user name of the person who entered the approval and previous approvers, if any.

- Related reports (if available)

  The reports provide related data displayed in charts or graphs to support the decision making process. See "Viewing Related Analytic Reports" in this guide for more information.

To view worklists:

1. On the iPhone, tap the Oracle Managers application icon.

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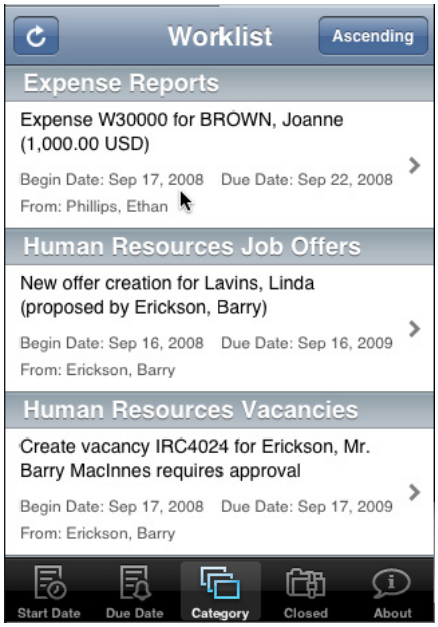

By default, the Worklist page displays the items awaiting approval by category.

2. On Worklist, tap any of the following options at the bottom of the page to determine how the application displays pending worklist items:
   - Category
   - Start Date
   - Due Date
3. Tap the worklist item that you want to view.

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4. In the Details section, tap any available menus to view additional details about the worklist item.

Example of detail lines

5. After reviewing the information, tap the button in the upper-left corner of the page to return to the worklist item.

Requesting More Information

To request more information about an item in a worklist:

1. On the Worklist page, tap the worklist item.
2. On the worklist header page, tap the Request More Info button.
3. Select the user from whom you wish to request more information.

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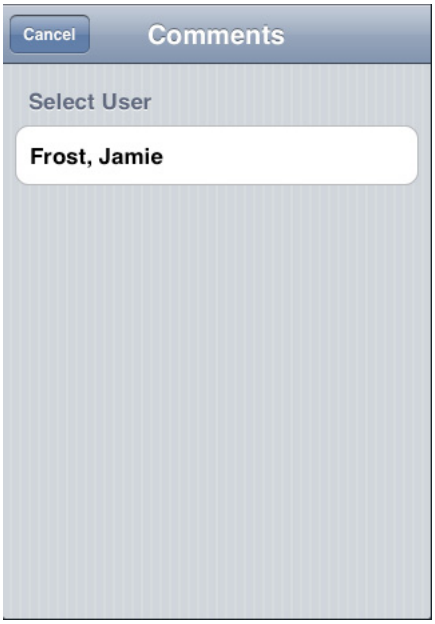
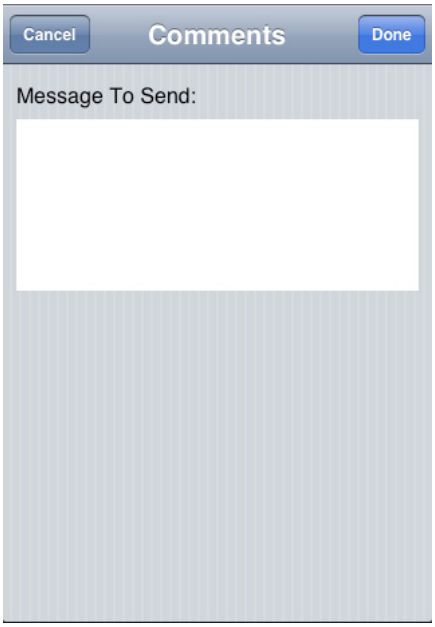


4. Enter your comments and tap Done.



Managers sends the worklist item with your comments to the user's worklist.

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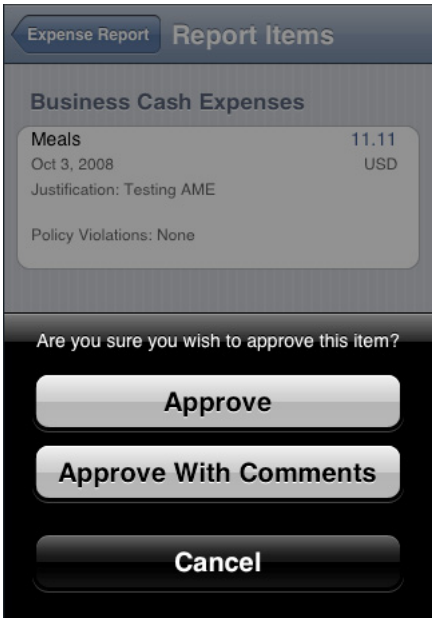
Approving Worklist Items

To approve items in a worklist:

1. On the Worklist page, tap the worklist item.
2. On the worklist header page, tap the Approve button.
3. Tap Approve to approve the item.



Managers sends an approval message to the source application and removes the item from the pending worklist.

4. If you want to add comments to the approval, tap Approve With Comments.
5. Enter your message and then tap OK to send the approval.

Rejecting Worklist Items

To reject items in a worklist:

1. On the Worklist page, tap an item in the worklist.
2. On the worklist header page, tap the Reject button.
3. Tap Reject to reject the approval.

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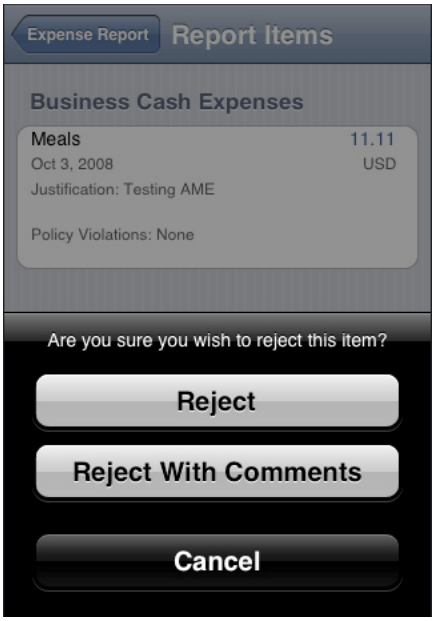

Managers sends a rejection message to the source application and removes the item from the pending worklists.

4. If you want to add a comment to the rejection, tap Reject With Comments.
5. Type your message and then tap OK to send the rejection.

Viewing Related Analytics

If you configured the Managers application settings to access analytic reports in OBIEE, you can view reports related to worklist items directly on the iPhone. The reports provide the business data you need to make an informed decision. For example, before deciding whether or not to approve a purchase order requisition, you can access a report that displays the remaining budget for expenditures for the current period.

To view related analytics:

1. On the Worklist page, tap a worklist item.
2. On the worklist header page, scroll down to the Related Analytics section.

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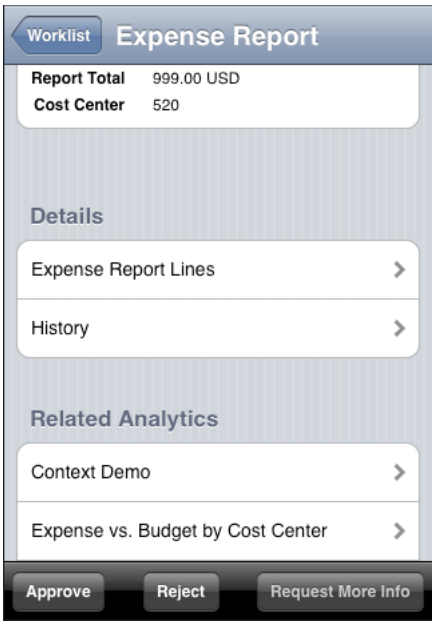
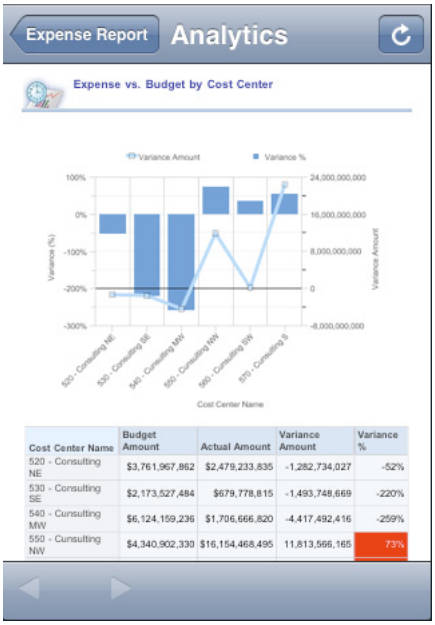


3. Tap the report that you want to view.



4. On the Analytics page, double-tap the report to zoom in or zoom out of the data.

   You can also turn the iPhone 90 degrees for a wider view of the data or chart.

5. Tap the button in the upper-left corner of the page to return to the worklist header page.

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Appendix A: Troubleshooting

This chapter includes the following topic:

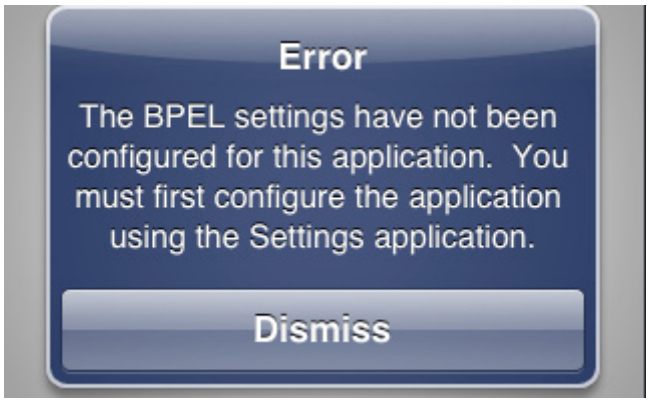
- Troubleshooting Configuration Issues

Troubleshooting Configuration Issues¶

This section details some common problems related to Managers and suggests possible solutions.

Symptom/Error – Missing BPEL Configuration

If you attempt to run the approval applications prior to configuring the BPEL Endpoint URL, you will receive the following message:



You will also receive this message if the endpoint URL is configured but the credentials are not configured.

Possible Solution

Access the Managers application settings and configure the BPEL endpoint URL and user credentials.

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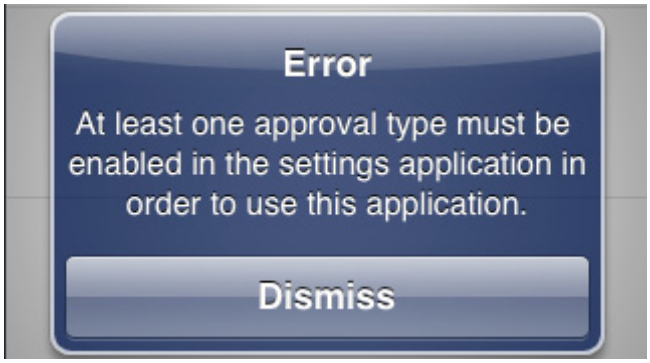
Symptom/Error – Worklist Types Not Selected¶

If you did not enable at least one worklist type, you will receive the following message:

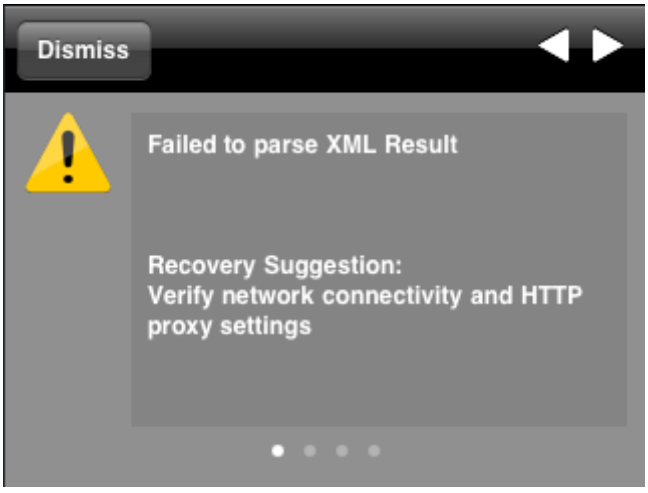


Possible Solution

Access the Managers application settings and enable at least one approval type.

Symptom/Error – Failed to Parse XML

The following "Failed to parse XML Result" error appears:



You receive this error once for each configured worklist type.

The application received some unexpected HTTP content from the configured URL. Verify that the endpoint URL is correct by performing these steps:

1. Launch Safari on the mobile device.
2. Enter the configured Endpoint URL into the address bar.
3. Verify that you receive a page containing the following content:

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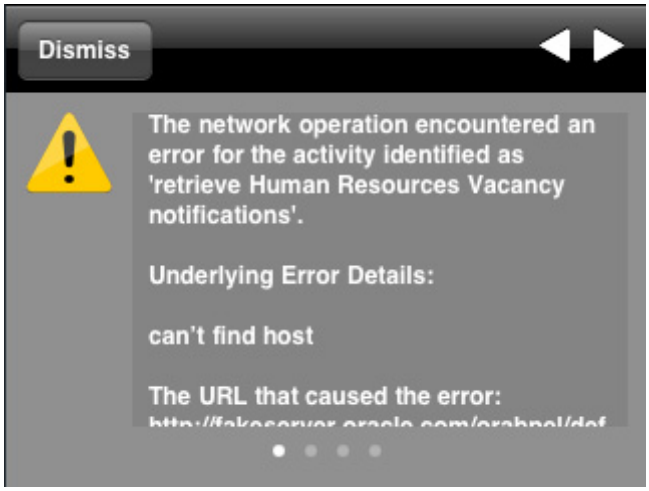
If you did not receive a page that contains this message – "No WebService Provider is registered at this URL," then the endpoint URL is not correct.

Possible Solution

In the Managers application settings, enter the correct endpoint URL for the BPEL server.

Symptom Error – Can't Find Host

An error appears that has an underlying cause "can't find host." You receive this error once for each configured worklist type:



The application was unable to resolve the configured host name in the BPEL endpoint URL, or the specified port was not valid. Verify the endpoint URL is correct by performing these steps:

1. Launch Safari on the mobile device.
2. In the address bar, enter the configured endpoint URL.
3. Verify you receive a page that contains this message: No WebService Provider is registered at this URL

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Verifying Web Service

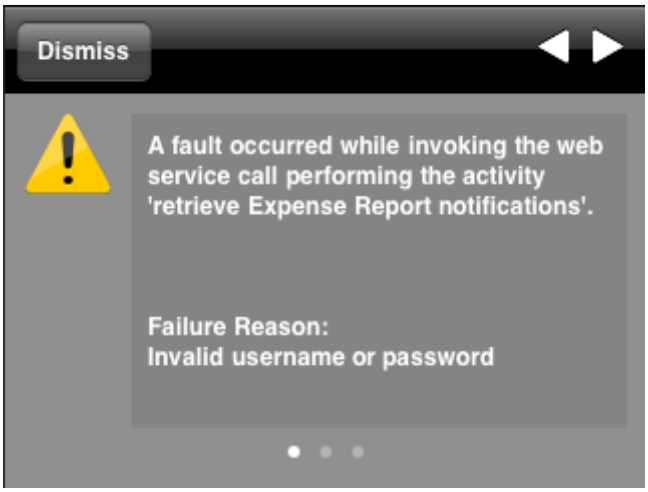
If you did not receive a page containing the text – "No WebService Provider is registered at this URL," the endpoint URL is not correct.

Possible Solution

In the application settings, enter the correct endpoint URL for the BPEL server.

Symptom/Error – Can't Find Host

An error appears that has an underlying cause "invalid username or password:"



You receive this error once for each configured worklist type.

Possible Solution

In the Managers application settings, enter the proper credentials.

Symptom/Error

Invalid Domain

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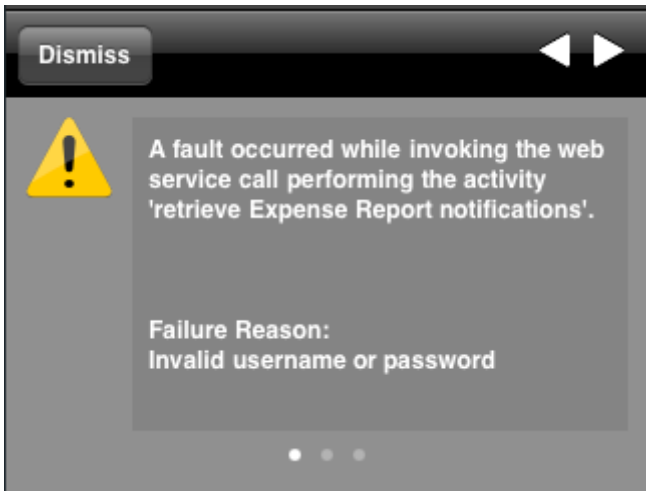
An error appears that has an underlying cause "ORABPEL-02052" and contains a message similar to "The BPEL domain 'domainname' cannot be found."



Note: The error code and message may vary slightly. You receive an "Invalid Domain" error message once for each configured worklist type.

Possible Solution

The domain portion of the configured BPEL endpoint URL is not correct. In the application settings, enter the correct endpoint URL for the BPEL server.

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Appendix B: Additional Information about Context Passing

This appendix includes the following topics:

- Example of Context Passing
- Header Variables for Context Passing

Example of Context Passing

The example in this section describes how to configure a report in Oracle BI Answers to use context passing from Managers. Context passing enables Managers to retrieve analytics from OBIEE based on the header field values of a particular worklist item, or approval request, in Managers.

In this scenario, a Managers user wants to see a report that compares the values of the budget versus actual expenditures based on cost center. The worklist item contains a cost center field in the header. The example below describes how to configure context passing in Oracle BI Answers so that the analytic reports retrieves data based on the cost center information in the worklist item.

To configure context passing, the user would follow these steps:

1. In Oracle BI Answers, create a report and save it in the proper folder in the repository, as described previously in the "Setting Up Analytics in OBIEE for Managers" section in this guide.

   For expense reports, place the report in the AP_EXPENSE folder.

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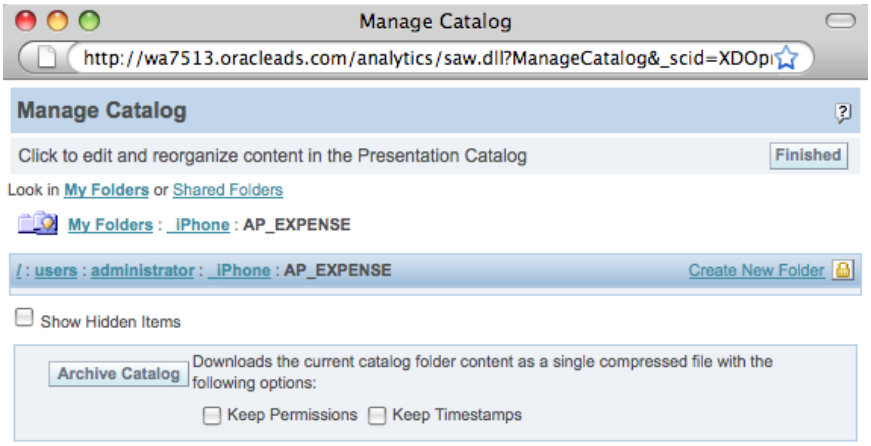
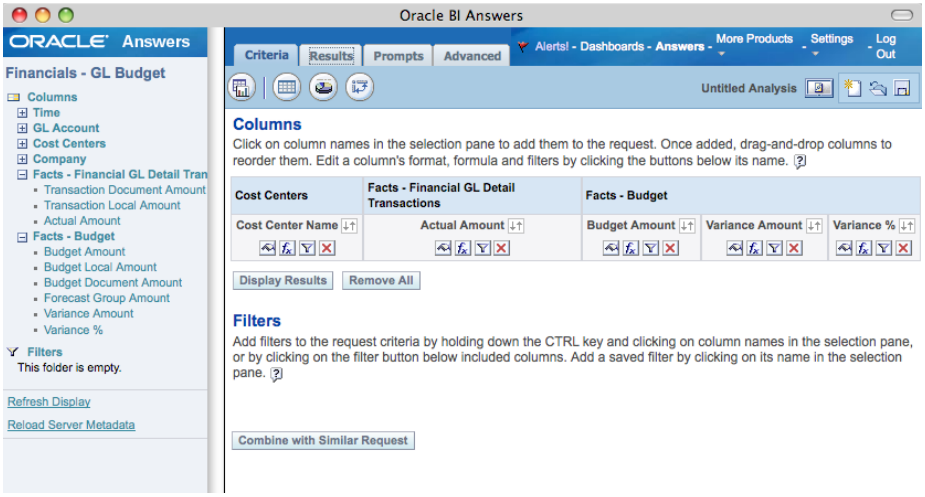


2. In Oracle BI Answers, create a report using the Financials - GL Budget subject area.



3. Add the Cost Center Name dimension and these facts:
   - Actual Amount
   - Budget Amount
   - Variance Amount
   - Variance %

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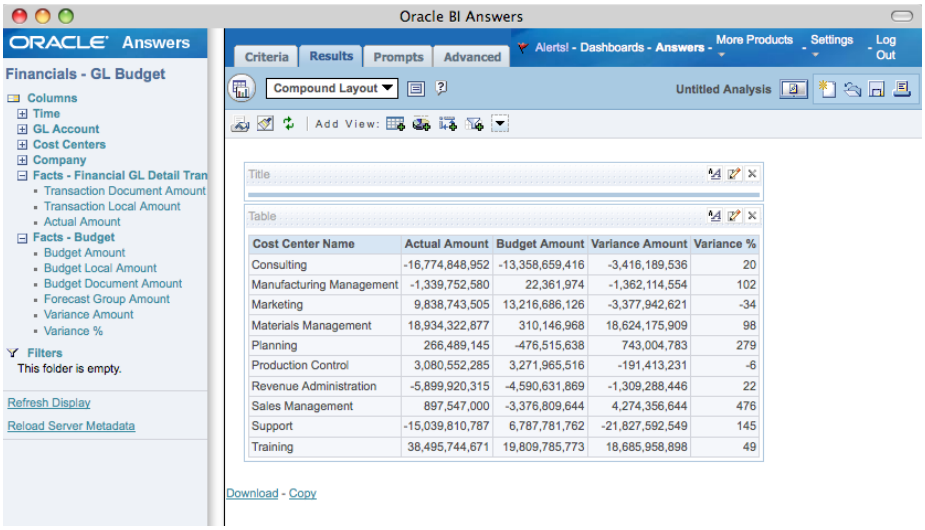
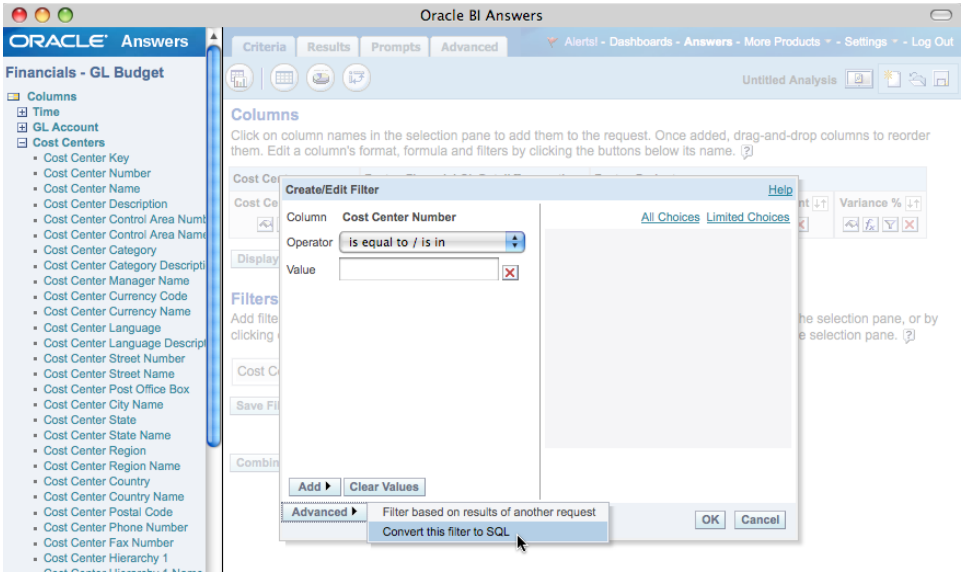


4. Click the Results tab to look at the data.



5. Filter the results based on the cost center. On the Criteria tab, create a filter for the Cost Center Number dimension.
6. Select the Advanced button and select the option to convert this filter to SQL using the header variable listed in the reference documentation.

   See "Header Variables for Context Passing."

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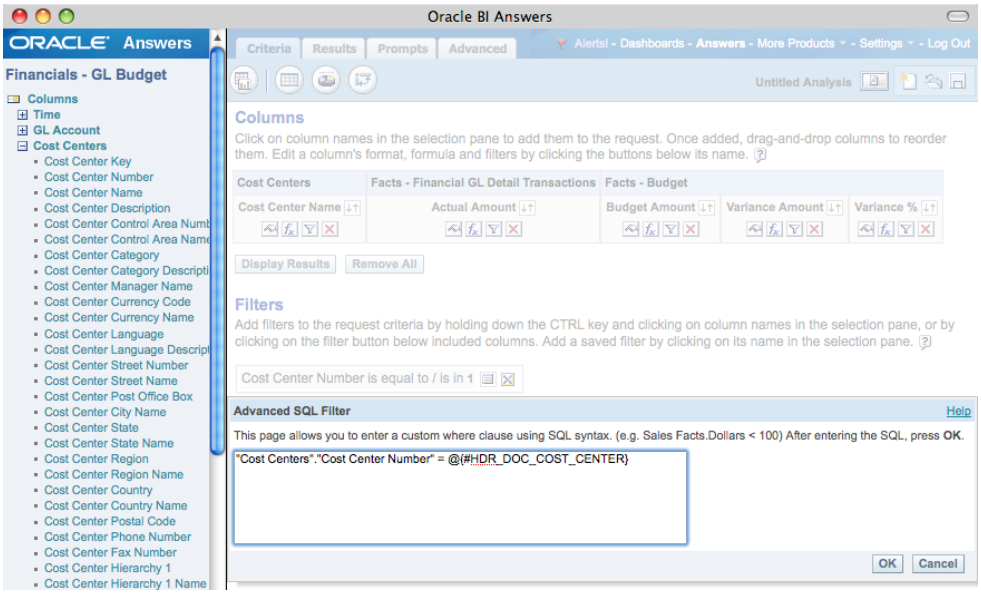
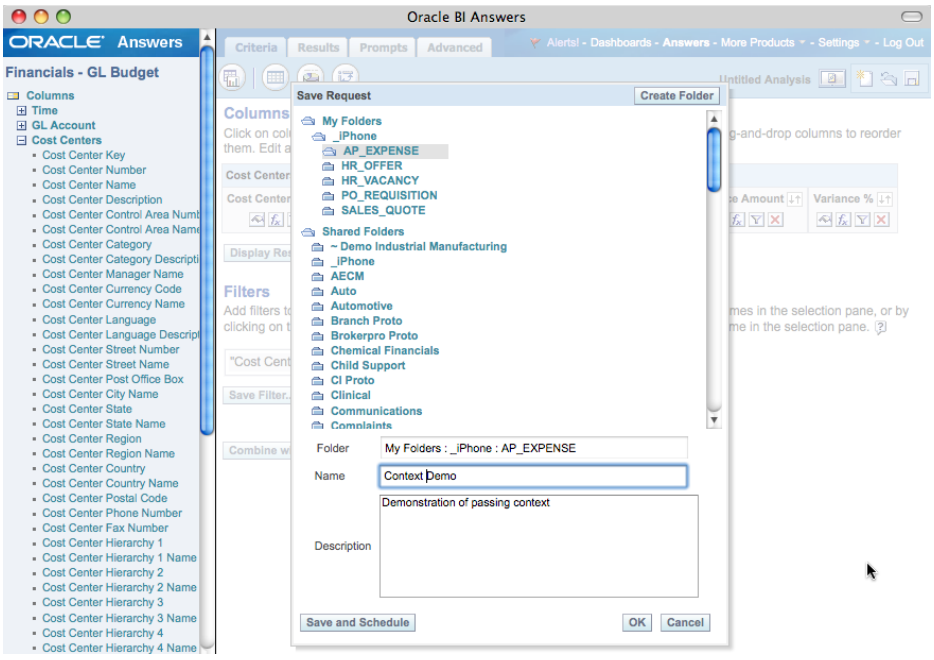


7. For the Cost Center field, which is named #HDR_DOC_COST_CENTER, create the text to substitute as:

   @{#HDR_DOC_COST_CENTER}



8. Save this report in the location defined for expense reports under My folders, as described in step 1.

   In this example, the report is named Context Demo.

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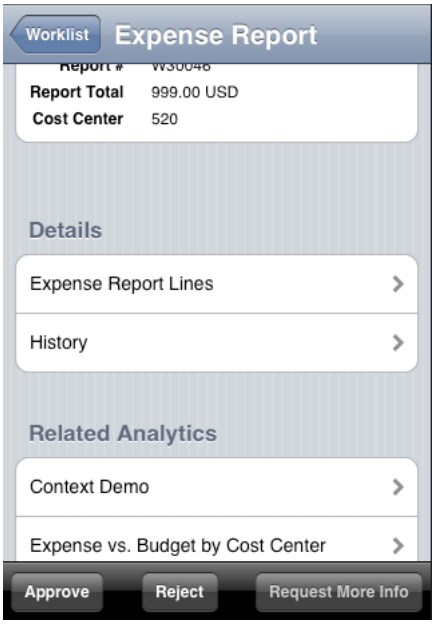

9. In the Managers application on the iPhone, select an expense report worklist item. The worklist header page displays a link to the Context Demo analytic report in the Related Analytics section.
10. In the Related Analytics section, tap the Context Demo report.

If the report displays the budget information for the cost center that is listed in the header field of the worklist item, then the configuration is successful.

Although this is a simple example, it demonstrates the potential of providing contextually aware analytics to improve business decisions.

Header Variables for Context Passing

This section describes the header variables that you can use for context passing for the following worklist types:

- Expense Reports
- Human Resources Job Offers

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- Human Resources Vacancies
- Purchase Order Requisitions

This table lists the header variables for Expense Reports:

Description	Variable
From	FromUserName
Purpose	#HDR_PURPOSE
Begin Date	BeginDate
Report #	DOCUMENT_NUMBER
Report Total	#HDR_DISPLAY_TOTAL
Cost Center	#HDR_DOC_COST_CENTER

This table lists the header variables for Human Resources Job Offers:

Description	Variable
From	FromUserName
Begin Date	BeginDate
Due Date	DueDate
Subject	Subject
Applicant Name	ApplicantName
Job Title	DiscretionaryJobTitle
Grade	Grade
Organization	Organization
Location	Location
Recruiter	Recruiter
Proposed Salary	ProposedSalary

This table lists the header variables for Human Resources Vacancies:

Description	Variable
Business Group	BusinessGroup
VacancyName	VacancyName
StartDate	StartDate
Manager	Manager
Organization	Organization
Status	Status
Job Title	JobTitle
Proposed Salary	ProposedSalary

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This table lists the header variables for Purchase Order Requisitions:

Description	Variable
To	ToUserName
From	FromUserName
Begin Date	BeginDate
Requisition #	DOCUMENT_NUMBER
Total Amount	TOTAL_AMOUNT_DSP

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