

Electronic Approval Routing for Procurement

By Pat Martino

WE1 Editor's Note: *In this article, Pat describes how to use the Workflow concept to effectively manage the Procurement approval process. Read on to learn about approval routes, approval levels, order activity rules, and other setup.*

Introduction

When a company is ready for it, JDE EnterpriseOne® Procurement workflow is a great way to manage the approval process for requisitions. Workflow is a great concept and a great tool, because it allows messages to be delivered to you, such as one that notifies you of the need to review a requisition for approval, as opposed to having hard-copy paperwork moving around the office, or the requisitioner having to type and send an E-mail to you, or you having to constantly check a certain screen for requisitions that need to be approved. And, when configured to do so, workflow can send an E-mail link directly to the approval program and specific requisition that needs to be reviewed.

With all of their capabilities, workflows come standard with the procurement system, and are not particularly difficult to set up. However, workflows do require that all approvers be on, and use, the Procurement system, and some companies have difficulty making that piece a reality.

But with that in mind, let's go through the workflow / electronic approval process to see if this method of managing requisitions would be right for you. We'll start our examination of the process with setup.

Note for World® Users:

The core approval logic described below is the same between World and Enterprise One, but instead of getting an email notification that an approval is needed, in World an approver directly accesses the approval workbench program to look for orders in need of approval.

For an excellent tip on how to achieve the automatic approval emailing in World, please see also [Setting Up Approval Processing to Use External Email](#) By Vasu Venkateswaran, in the Knowledge Express Library.

"JDE introduced Approval Processing for purchasing in WorldSoftware A7.3 in 1993. Ever since, clients have wanted to know how to get the system to send email notifications to external email addresses (outside of JDE's rudimentary PPAT module). Your wait is over! An excellent explanation that has been field-proven at several clients."

Approval Route Revisions

Approval routes define the persons involved in the approval process and the approval levels that they are authorized to "sign" for.

Setup of approval routes can be found under the Non-Stock Based Order Generation/ Approval/ Release menu G43B13:

Description	Job To Execute	Version
Approval Level Revisions	P43008	ZJDE0001
Orders Awaiting Approval	P43081	ZJDE0002
Approval Review	P43081	ZJDE0002
Review Approval Notification	P012501	ZJDE0001
Approval Delegation	P43280	
Generate Quotes from Reqs.	P43060	ZJDE0003
Generate POs from Requisitions	P43060	ZJDE0002
Generate POs from Quotes	P43360	ZJDE0001
Generate POs from Blanket	P43060	ZJDE0001
Release Held Orders	P43070	ZJDE0001
Release Held Orders (Budget)	P43070	ZJDE0001
Status Code Update	P43025	ZJDE0002
Purchasing Date Revisions	P4310	ZJDE0001

Approval routes are based on order type, so let's have a look at the demo data route for requisitions (OR) provided with the standard system install, named DEMO:

From Amount	Person	Responsible
100	8444	O'Malley, James
1,000	6002	Abbott, Dominique
5,000	7500	McDougle, Cathy
0		

To understand the setup, figure that any user that enters a requisition tied to the DEMO route code (including the DEMO user, which is currently address book number 1001), can be automatically approved for an order value of up to \$100. At \$100 and beyond, person 8444 must approve the requisition, and in addition, starting at \$1000, person 6002 must approve, etc.

Perhaps you noticed that these persons do not work at your company? Well, since we are working with demo data, we will need to use their address book values to make the process work. In fact, in order to approve requisitions that are traveling through the approval process, we will have to *become* these persons!

Let's move on . . .

This Article Continues...

Subscribers, log in from our main search page to access the full article:

www.JDEtips.com/MyAccess.html

Not a Subscriber? Gain access to our full library of JDE topics:

www.JDEtips.com/JD-Edwards-Library

Visit www.JDEtips.com for information on the JDEtips University schedule, private training and consulting, and our Knowledge Express Document Library.

License Information: The use of JDE is granted to JDEtips, Inc. by permission from J.D. Edwards World Source Company. The information on this website and in our publications is the copyrighted work of JDEtips, Inc. and is owned by JDEtips, Inc.

NO WARRANTY: This documentation is delivered as is, and JDEtips, Inc. makes no warranty as to its accuracy or use. Any use of this documentation is at the risk of the user. Although we make every good faith effort to ensure accuracy, this document may include technical or other inaccuracies or typographical errors. JDEtips, Inc. reserves the right to make changes without prior notice.

Oracle and J.D. Edwards EnterpriseOne and World are trademarks or registered trademarks of Oracle Corporation. All other trademarks and product names are the property of their respective owners.

Copyright © by JDEtips, Inc.