

Electronic Approval Routing for Procurement

By Pat Martino

W E1 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.

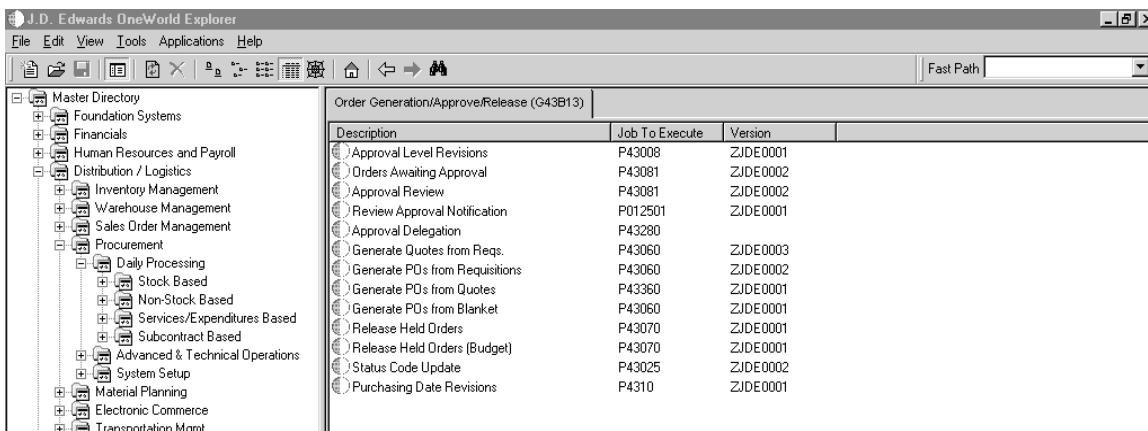
For an excellent tip on how to achieve the automatic approval emailing in World, please see also [Setting Up Approval Processing to Use External Email](#) By Vasu Venkateswaran, in the Knowledge Express Library.

"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."

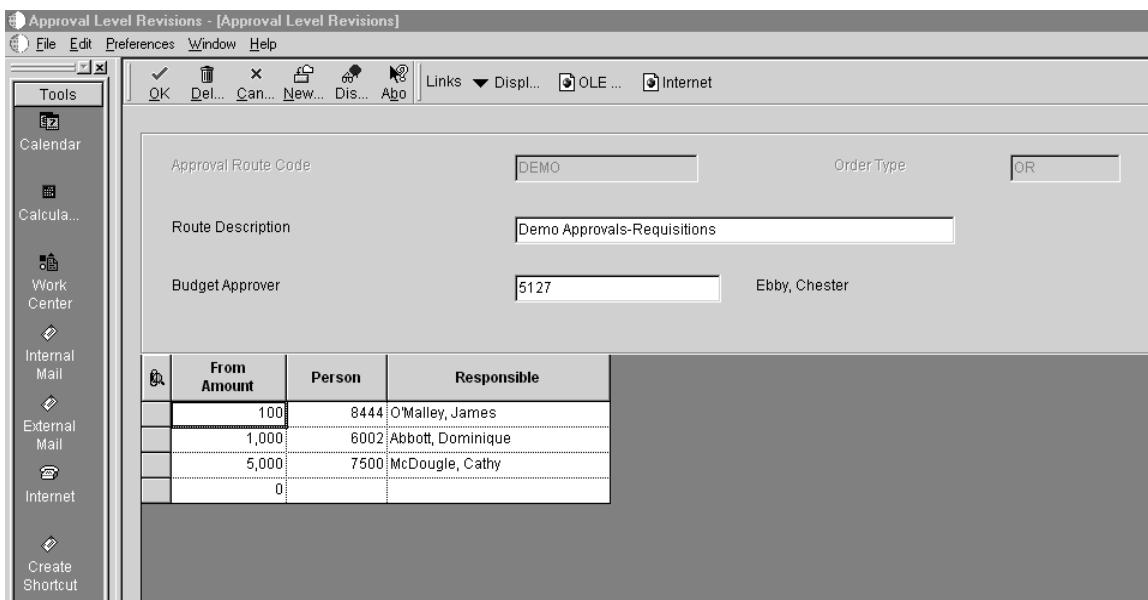
Approval Route Revisions

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:



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:



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 . . .

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