

Approval Discussion

Overview

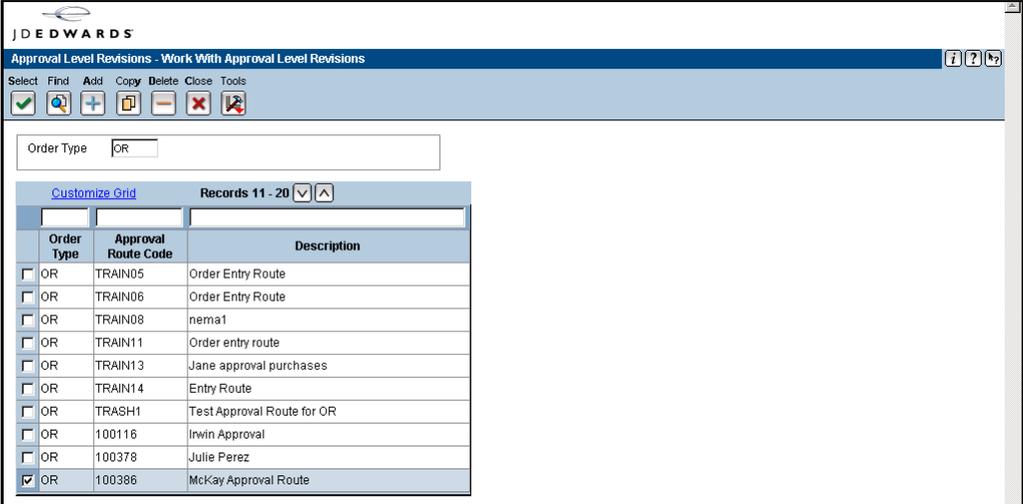
For every individual responsible for entering an order, a valid approval route must exist. When an order is created, the system will search for the approval route assigned to the entry personnel and associate the list of approvers with the order created. The 'Orders Awaiting Approval' screen is used to find orders that are awaiting approval, have been approved or rejected.

The following descriptions and screens use a purchase requisition document (OR document type) entered by userid 100386 (McKay). Topics to be presented include:

1. Approval Routes
2. How Orders and Routes are Associated
3. Approving a Purchase Document
4. Rejecting a Purchase Document

Approval Routes

A list of approvers will be assigned to each user based on document type. Each list will be identified with the user's id number. In the examples to follow, the approval route 100386 for OR documents will be used.



Order Type	Approval Route Code	Description
<input type="checkbox"/>	OR TRAIN05	Order Entry Route
<input type="checkbox"/>	OR TRAIN06	Order Entry Route
<input type="checkbox"/>	OR TRAIN08	nema1
<input type="checkbox"/>	OR TRAIN11	Order entry route
<input type="checkbox"/>	OR TRAIN13	Jane approval purchases
<input type="checkbox"/>	OR TRAIN14	Entry Route
<input type="checkbox"/>	OR TRASH1	Test Approval Route for OR
<input type="checkbox"/>	OR 100116	Irwin Approval
<input type="checkbox"/>	OR 100378	Julie Perez
<input checked="" type="checkbox"/>	OR 100386	McKay Approval Route

The list of approvers for 100386 is Turner, Perez and Irwin. For orders less than \$500, Turner will be the only approver required. Orders less than \$1000 will also require Perez to approve or reject. Orders over \$1000 will require Irwin as an approver if not rejected by Turner or Perez.

How Orders and Routes are Associated

When an order is completed (a header and detail lines exist), the system will search the approval route table to match the document type and user id. The Approval code field will be placed on the header record to associate the order with the specified list of approvers.

On this example, 100386 is the route associated with this OR document. NISKMCKAY is the name of the user with 100386 as an addressbook number in the system, making it easy to associate an approval route directly to a user.

 Approval Code field automatically populates with the Employee's address book number (their approval code is their address book number).

Purchase requisition order number, 1511 OR, is for \$4000. The user (McKay) may expect the following document's approval route to pass through Turner, Perez and Irwin. Subsequent screenshots will show this orders progress through the approval process.

J D E D W A R D S

Enter Non-Contract/Non-Stock \$0-\$4999 OR - Order Detail

OK Cancel Form Row Tools

Order Detail Line Defaults

Order Number: 1511 OR 56530 Business Unit: 65060003

Supplier: 501130 TELEPHONE CONNECTI... Order Revision: 0

Ship To: 127493 DAS - COMMUNICATIONS Order Date: 02/18/2003

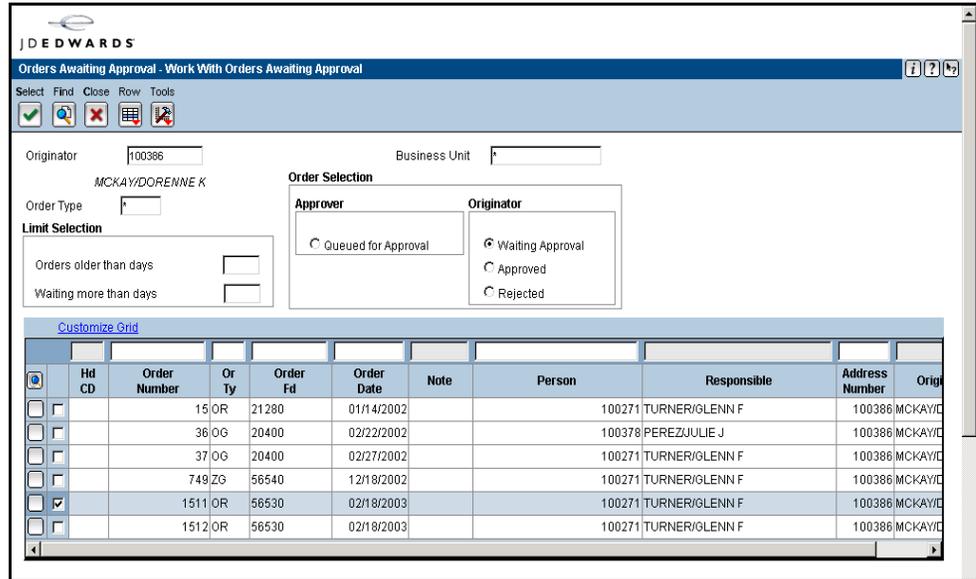
Hold Code: Blank - Hold Codes 42/HC

Customize Grid

Change Order	Inventory Number	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Ln Ty	Description 1
000	72559	5	EA	800.0000	4,000.00	EA	J	COMPUTER HARDWARE EQUIPMENT

Approving a Purchase Document

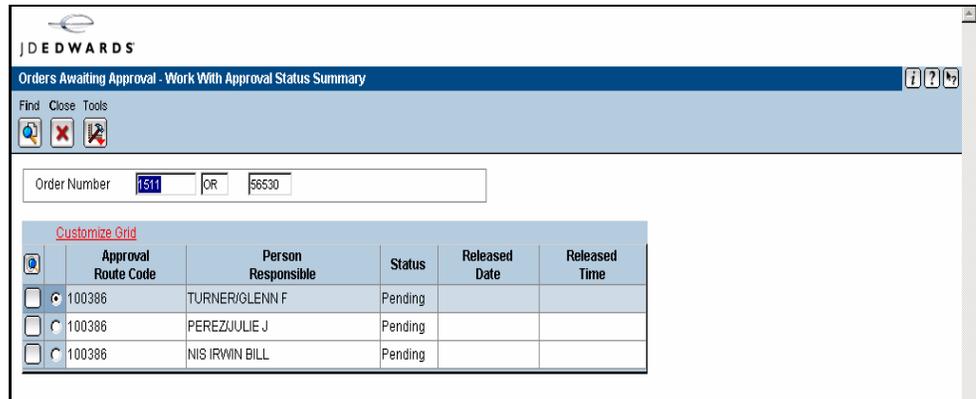
On the Orders Awaiting Approval screen, the Originator's number (100386) is entered on the upper left of the screen. In the Originator box, Waiting Approval is checked. The Document 1511 OR is highlighted and awaits approval from Turner.



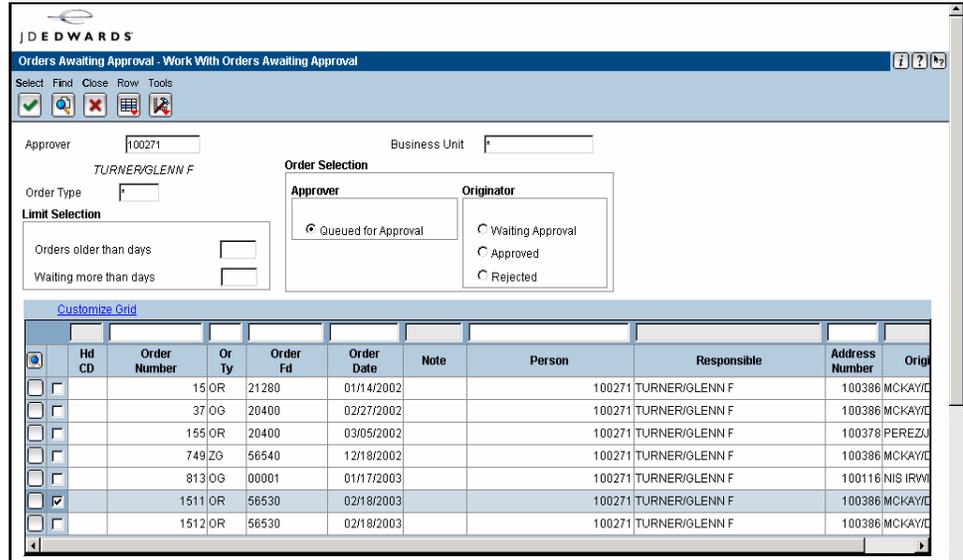
The Orders Awaiting Approval screen may be used to view the Order Status of this order. Choose the line of the order, select the ROW exit Status Summary and the current status of the order will be displayed.

-  Originator field automatically populates with the address book number of the end user.
-  Order Selection: Originator: Waiting Approval is selected
-  The Row in the Grid that has data for the specific document to review is selected

On the Status Summary screen, the order appears to be at the beginning of the approval life cycle, with approvals pending review by Turner, Perez and Irwin.



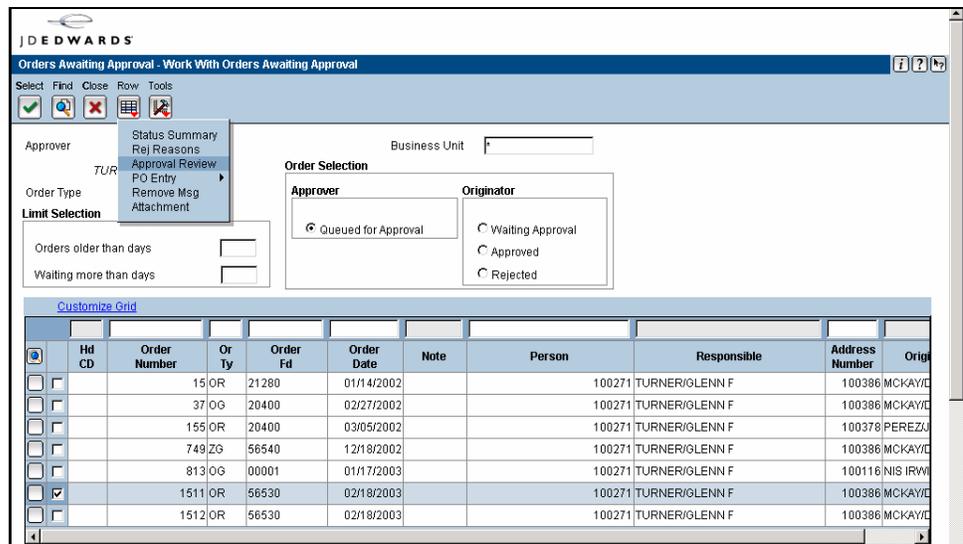
On the Orders Awaiting Approval screen, the approver enters their ID and clicks the radio button in the Order Selection field “Queued for Approval”. Turner may view all orders queued for approval.



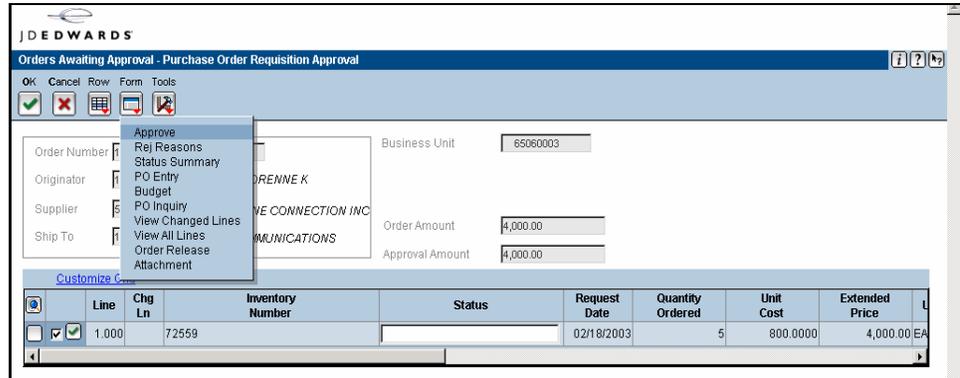
- Approver field is with the address book number of the end user who should approve the document.
- Order Selection: Approver: Queued for Approval is selected
- The Row in the Grid that has data for the specific document to review and approve/reject is selected

To approve purchase requisition 1511 OR, choose the Row in the grid that has the order that you want to approve

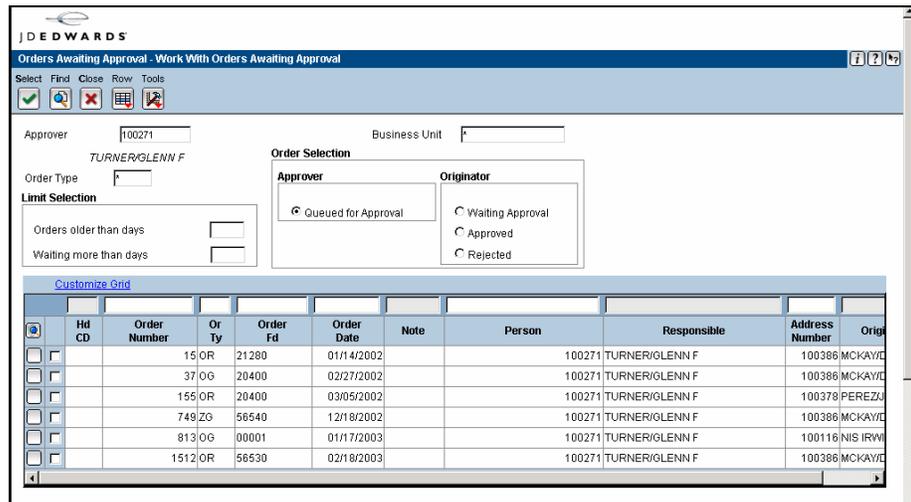
From ROW, select Approval Review.



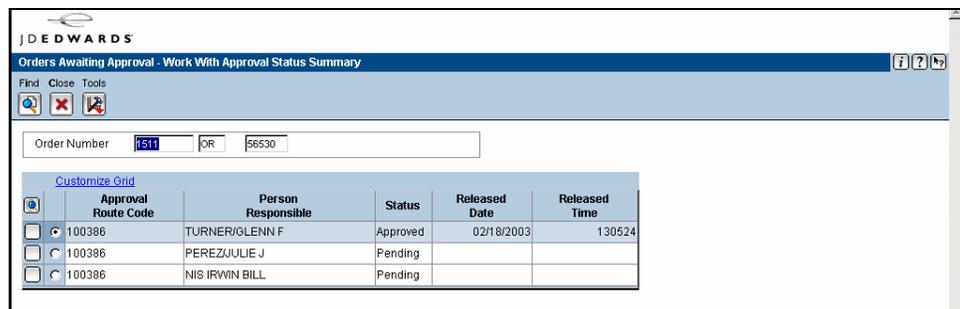
The Approval Review selection will have a FORM exit. By clicking on the 'Approve' option, it will complete the approval review process for Turner; advancing the order to the next step down the approval route. In this example, Perez will be the next approver on the list.



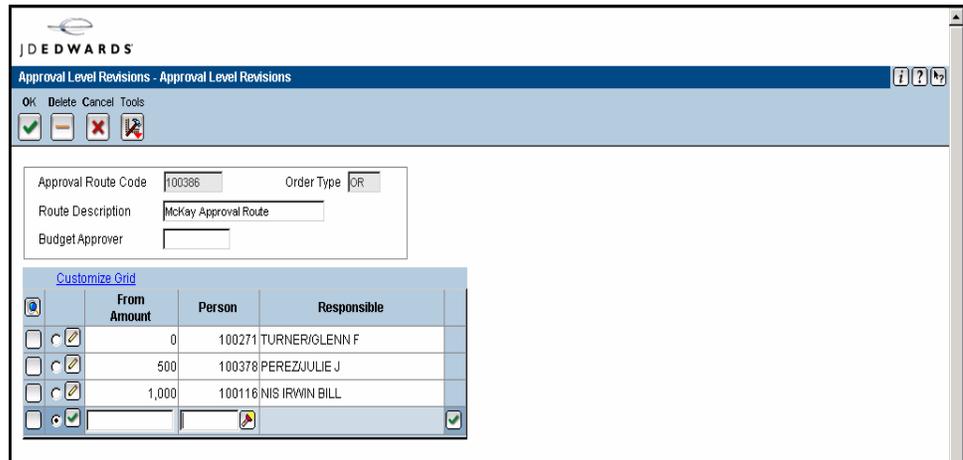
Purchase requisition 1511 OR will no longer appear on the list for Turner to approve.



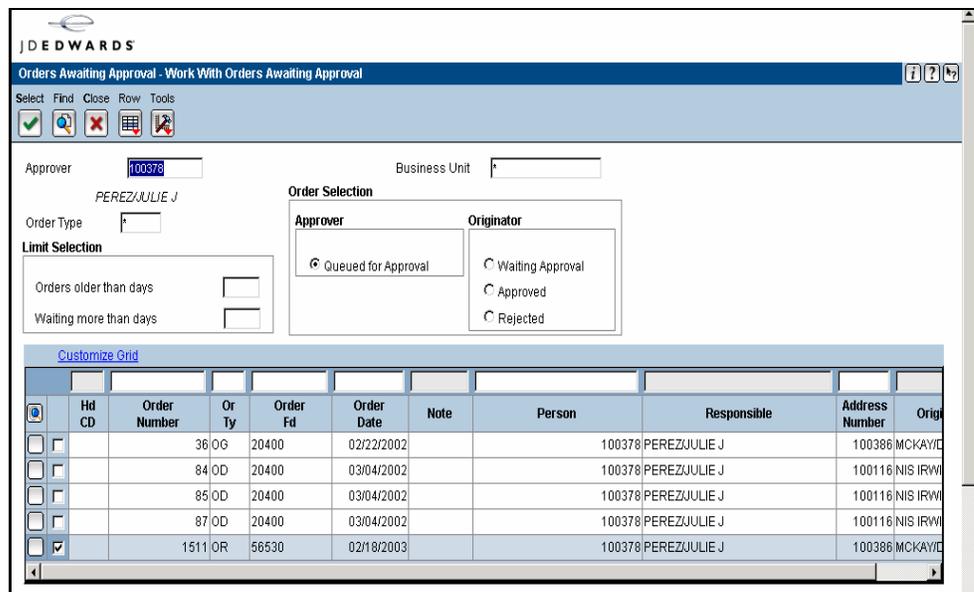
The Order Status Summary will indicate that Turner has approved the purchase requisition including the release date and time.



The purchase requisition is for \$4000. Reviewing the approval route shows that Perez will be the approver to follow Turner. Having a higher dollar limit for approval, Irwin may also approve the order, bypassing Perez's approval.



The Approval Screen shows, Perez is the next user notified that an approval is requested for purchase requisition 1511 OR. The Awaiting Approval screen can be used by anyone with approval, to view orders waiting approval, approved, or rejected. (REMEMBER there are two possible approvers remaining on the list for this order).



 This screen shows Perez viewing purchase documents queued for approval.

The process for subsequent approvals remains the same. On the Orders Awaiting Approval – Work With Orders Awaiting Approval screen; ROW exit to the Approval Review. In this example Irwin will approve the purchase requisition bypassing Perez.

	Hd CD	Order Number	Or Ty	Order Fd	Order Date	Note	Person	Responsible	Address Number	Orig
<input type="checkbox"/>		36	OG	20400	02/22/2002		100378	PEREZJULIE J	100386	MCKAYV
<input type="checkbox"/>		84	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI
<input type="checkbox"/>		85	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI
<input type="checkbox"/>		87	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI
<input checked="" type="checkbox"/>		1511	OR	56530	02/18/2003		100378	PEREZJULIE J	100386	MCKAYV

Form exit to select Approve.

Line	Chg Ln	Inventory Number	Status	Request Date	Quantity Ordered	Unit Cost	Extended Price
<input checked="" type="checkbox"/>	1.000	72559		02/18/2003	5	800.0000	4,000.00

After Irwin approves the purchase requisition, it will not appear on either Irwin or Perez's users list, orders Queued for Approval.

	Hd CD	Order Number	Or Ty	Order Fd	Order Date	Note	Person	Responsible	Address Number	Orig
<input type="checkbox"/>		36	OG	20400	02/22/2002		100378	PEREZJULIE J	100386	MCKAYV
<input type="checkbox"/>		84	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI
<input type="checkbox"/>		85	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI
<input type="checkbox"/>		87	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI

On the Awaiting Approval screen, the user may enter the Originator's number in the upper left of the screen, and select 'Approved' in the Originator box to see that the order is now approved.

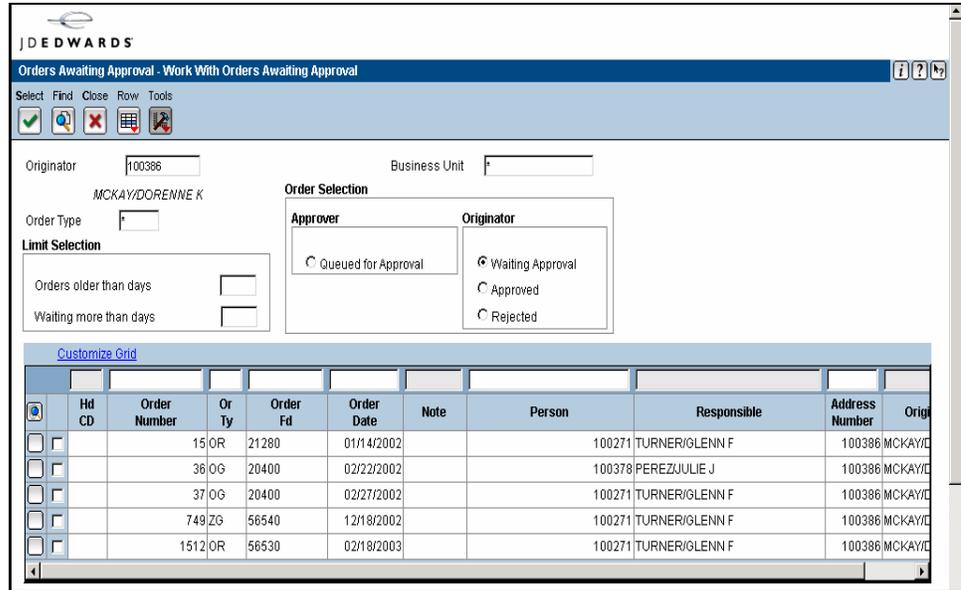
 The Row in the Grid that has data for the specific documents that have been approved – 1511 OR

To review the history of the order, go back to the Approval Status screen. It is obvious from the screen print that Irwin, with the higher approval authority, was the second approver, allowing the order to proceed down the road to becoming a purchase order.

 In the status column, Perez has been bypassed.

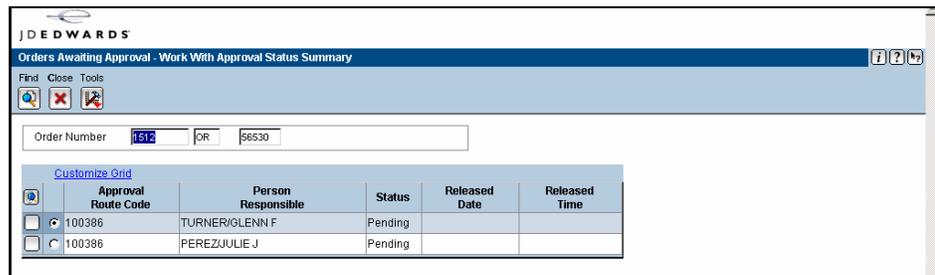
Rejecting a Purchase Document

Using a new purchase requisition, 1512 OR for \$850, the same screens may be used to reject an order. Purchase documents may be rejected for many reasons (wrong account numbers, incorrect part numbers, exceeding dollar limits, etc.).



-  Originator field automatically populates with the address book number of the end user.
-  Originator: Waiting Approval is selected.
-  The Row in the Grid that has data for the specific documents that require approval - 1512 OR is waiting approval from Turner.

Reviewing the Status Summary, the user will see that only two of the three approvers are required, because the order is less than \$1000.



Screen shot of the purchase requisition 1512 OR.

Change Order	Inventory Number	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Ln Ty	Description 1	Description 2
000	72559	1	EA	800.0000	800.00	EA	J	COMPUTER HARDWARE EQUIP	
000	72560	1	EA	50.0000	50.00	EA	J	COMPUTER HARDWARE EQUIP	

REVIEW APPROVAL:

On the Awaiting Approval screen, Turner will choose the order to review.

Hd CD	Order Number	Or Ty	Order Fd	Order Date	Note	Person	Responsible	Address Number	Origin
	15	OR	21280	01/14/2002		100271	TURNER/GLENN F	100386	MCKAY/D
	37	OG	20400	02/27/2002		100271	TURNER/GLENN F	100386	MCKAY/D
	155	OR	20400	03/05/2002		100271	TURNER/GLENN F	100378	PEREZ/J
	749	ZG	56540	12/18/2002		100271	TURNER/GLENN F	100386	MCKAY/D
	813	OG	00001	01/17/2003		100271	TURNER/GLENN F	100116	NIS IRW
<input checked="" type="checkbox"/>	1512	OR	56530	02/18/2003		100271	TURNER/GLENN F	100386	MCKAY/D

From the ROW exit, select the 'Approval Review' option.

Selecting the 'Approve' option will release the document from Turner's queue. Remember, the 'Approve' option came from the FORM exit.

J D E D W A R D S

Orders Awaiting Approval - Purchase Order Requisition Approval

OK Cancel Row Form Tools

Order Number: 1512
 Originator: TURNER, GLENN F
 Supplier: COMMUNICATIONS CONNECTION INC
 Ship To: COMMUNICATIONS

Business Unit: 65060003
 Order Amount: \$50.00
 Approval Amount: \$50.00

Approve
 Rej Reasons
 Status Summary
 PO Entry
 Budget
 PO Inquiry
 View Changed Lines
 View All Lines
 Order Release
 Attachment

Line	Chg Ln	Inventory Number	Status	Request Date	Quantity Ordered	Unit Cost	Extended Price
1.000		72559		02/18/2003	1	800.0000	800.00 EA
2.000		72560		02/18/2003	1	50.0000	50.00 EA

After Approval, the purchase requisition 1512 OR can not be viewed on the Queued for Approval list for Turner.

J D E D W A R D S

Orders Awaiting Approval - Work With Orders Awaiting Approval

Select Find Close Row Tools

Approver: 100271 TURNER, GLENN F
 Business Unit: []

Order Type: []

Limit Selection
 Orders older than days: []
 Waiting more than days: []

Order Selection
 Approver: Queued for Approval
 Originator: Waiting Approval
 Approved
 Rejected

Hd CD	Order Number	Or Ty	Order Fd	Order Date	Note	Person	Responsible	Address Number	Orig
	15 OR		21280	01/14/2002		100271	TURNER, GLENN F	100386	MCKAY, D
	37 OG		20400	02/27/2002		100271	TURNER, GLENN F	100386	MCKAY, D
	155 OR		20400	03/05/2002		100271	TURNER, GLENN F	100378	PEREZ, J
	749 ZG		56540	12/18/2002		100271	TURNER, GLENN F	100386	MCKAY, D
	813 OG		00001	01/17/2003		100271	TURNER, GLENN F	100116	NIS IRW

Perez is next on the Approval Route.

J D E D W A R D S

Orders Awaiting Approval - Work With Orders Awaiting Approval

Select Find Close Row Tools

Approver: [] PEREZ, JULIE J
 Business Unit: []

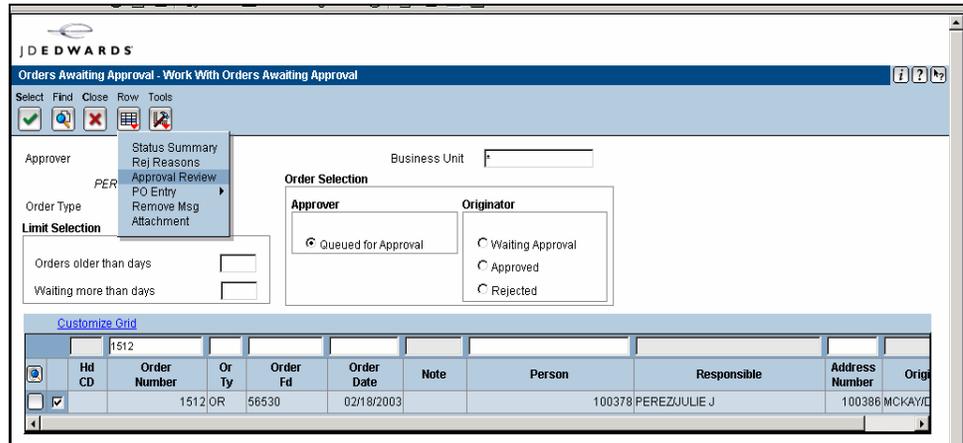
Order Type: []

Limit Selection
 Orders older than days: []
 Waiting more than days: []

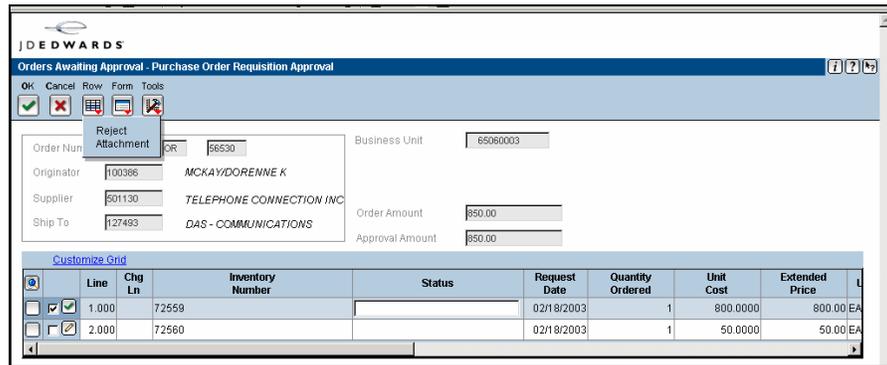
Order Selection
 Approver: Queued for Approval
 Originator: Waiting Approval
 Approved
 Rejected

Hd CD	Order Number	Or Ty	Order Fd	Order Date	Note	Person	Responsible	Address Number	Orig
	1512 OR		56530	02/18/2003		100378	PEREZ, JULIE J	100386	MCKAY, D

Perez will follow the same process through Approval Review to reject the order.

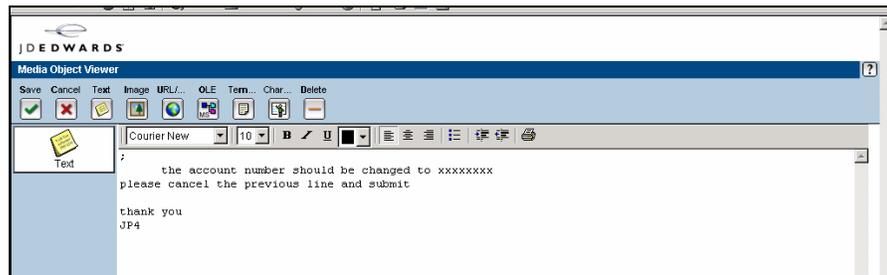


The only change in the process is to use the ROW exit option. Selecting 'Attachment' is recommended to document text describing why the order is rejected, and what remedy is recommended.



 Line two has a pencil icon at the beginning of the line, indicating an attachment has been included.

To add an attachment, click the Text Icon and add a rejection reason.



Selecting the 'Reject' option will take the user to the Rejection screen allowing a free-form short Remark field at both the header and detail level. The user may use either or both fields.

Enter remarks as necessary. Future use may include placing 'x' or any other character in one of the 8 check boxes also on this screen.

Click 'OK' to complete the rejection process.

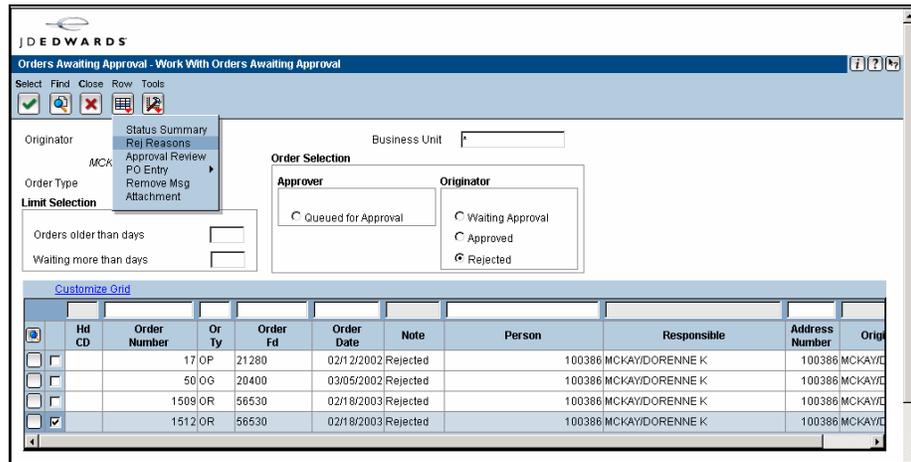
The Originator may use the same screen as the approvers to follow the progress of the purchase requisition. The recently rejected document is displayed on the following screen print.

Hd CD	Order Number	Or Ty	Order Fd	Order Date	Note	Person	Responsible	Address Number	Origin
	17	OP	21280	02/12/2002	Rejected	100386	MCKAYDORENNE K	100386	MCKAYD
	50	OG	20400	03/05/2002	Rejected	100386	MCKAYDORENNE K	100386	MCKAYD
	1509	OR	56530	02/18/2003	Rejected	100386	MCKAYDORENNE K	100386	MCKAYD
	1512	OR	56530	02/18/2003	Rejected	100386	MCKAYDORENNE K	100386	MCKAYD

The Rejection Reasons screen may be accessed by the Originator by using the ROW exit.

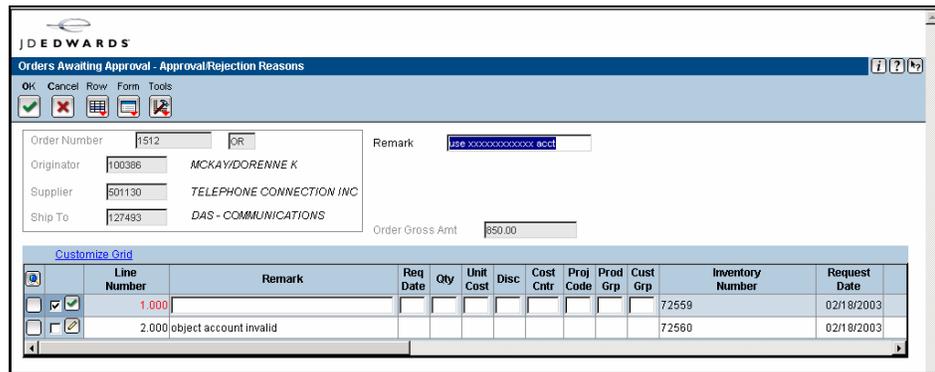
-  Originator field automatically populates with the address book number of the end user.
-  Order Selection: Originator: Rejected is selected.

 The Row in the Grid that has data for the specific documents that require approval - 1512 OR is rejected.



Hd CD	Order Number	Or Ty	Order Fd	Order Date	Note	Person	Responsible	Address Number	Orig
	17	OP	21280	02/12/2002	Rejected	100386	MCKAYDORENNE K	100386	MCKAYD
	50	OG	20400	03/05/2002	Rejected	100386	MCKAYDORENNE K	100386	MCKAYD
	1509	OR	56530	02/18/2003	Rejected	100386	MCKAYDORENNE K	100386	MCKAYD
	1512	OR	56530	02/18/2003	Rejected	100386	MCKAYDORENNE K	100386	MCKAYD

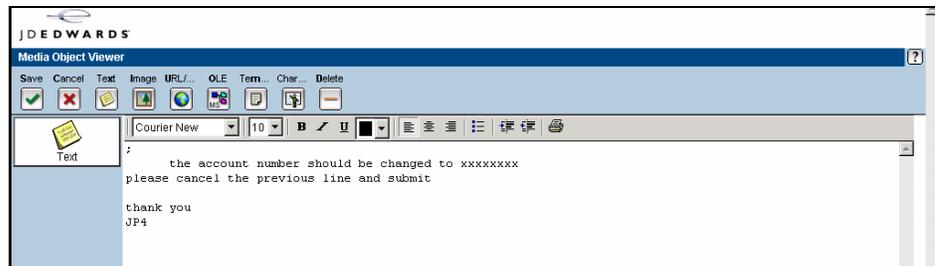
The originator may review the same rejection screens used by the approver.



Order Number: 1512 OR
 Remark: Use xxxxxxxxxxxxxx acct
 Originator: 100386 MCKAYDORENNE K
 Supplier: 501130 TELEPHONE CONNECTION INC
 Ship To: 127493 DAS - COMMUNICATIONS
 Order Gross Amt: \$50.00

Line Number	Remark	Req Date	Qty	Unit Cost	Disc	Cost Cntr	Proj Code	Proj Grp	Cust Grp	Inventory Number	Request Date
1.000										72559	02/18/2003
2.000	object account invalid									72560	02/18/2003

The attachments may be viewed exactly as entered by the rejecter.



the account number should be changed to xxxxxxxx
 please cancel the previous line and submit
 thank you
 JP4

Once the purchase requisition is rejected, the Status Summary will reflect the date that Turner approved it and Perez rejected it.

	Hd CD	Order Number	Or Ty	Order Id	Order Date	Note	Person	Responsible	Address Number	Orig
<input type="checkbox"/>		36	OG	20400	02/22/2002		100378	PEREZJULIE J	100386	MCKAY/D
<input type="checkbox"/>		84	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI
<input type="checkbox"/>		85	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI
<input type="checkbox"/>		87	OD	20400	03/04/2002		100378	PEREZJULIE J	100116	NIS IRWI
<input checked="" type="checkbox"/>		1512	OR	56530	02/18/2003		100378	PEREZJULIE J	100386	MCKAY/D

The history related to this purchase requisition can be viewed on the Orders Awaiting Approval screen.

	Approval Route Code	Person Responsible	Status	Released Date	Released Time
<input checked="" type="checkbox"/>	100386	TURNER/GLENN F	Approved	02/18/2003	132827
<input type="checkbox"/>	100386	PEREZJULIE J	Rejected	02/18/2003	171329
<input type="checkbox"/>	100386	TURNER/GLENN F	Pending		
<input type="checkbox"/>	100386	PEREZJULIE J	Pending		

 After the originator corrects the purchase requisition, it will go back through the approval process, requiring Turner and Perez's approval - Status Column populates with "Pending" status for approval.