



JD Edwards World

Approvals Management

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Approvals Management

Overview

Businesses are being forced to apply tighter controls to all of their data; either to ensure that their business processes are under control or that they can pass regulatory compliance audits.

The JD Edwards World Approvals Management system provides a powerful, highly configurable way to monitor activity within your system. Managers can define conditions such as a change in credit limit or security tax that trigger the creation of an approval request.

The enhancements to Approvals Management functionality provide additional functions. These enhancements allow you to:

- [Purchase Order Approval Process Files](#)
- [E-mail Processing](#)
 - [Set an e-mail Address using Send Distribution](#)
 - [Set an e-mail Address using Approvals Notification Processor](#)
- [Approvals Constants Screen](#)
- [Configuring Approvals Management](#)
- [Convert Purchase Order Approval Levels to Approvals Management Purchase Order Approval Rule Set](#)
- [Configure Approval Rule Set Calculation](#)
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- [Processing Approvals](#)
 - [Review Transaction Messages](#)
 - [Send Email Notification](#)
 - [Run Transaction Report](#)
 - [Run Approval Request Report](#)

Purchase Order Approval Process Files

Approvals Management for Purchase Orders includes the following files:

- F4301 – Purchase Order Header

- **F4311 – Purchase Order Detail**

Any change to these files, including additions, deletions, or changes to existing records, triggers the creation of a transaction. The type of transaction created depends on which purchase order approval processes are turned on; purchase order header, or purchase order detail.

If purchase order header approval is turned on and purchase order detail approval is turned off, the system creates a purchase order header transaction if an addition or change is made to F4301 or an addition or change is made to F4311. The transaction detail contains information related to the F4301 record and any related F4311 records.

If purchase order header approval is turned on and purchase order detail approval is turned on, the system creates a purchase order header transaction if an addition or change is made to F4301. The transaction detail contains information related to the F4301 record. The system creates a purchase order detail transaction if an addition or change is made to F4311. The transaction detail contains information related to the F4311 record.

If purchase order header approval is turned off and purchase order detail approval is turned on, the system creates a purchase order detail transaction if an addition or change is made to F4311. The transaction detail contains information related to the F4311 record.

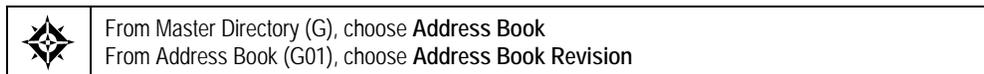
E-mail Processing

E-mail messages can be sent from the approvals management system in:

- Real-time, using Send Distribution
- Batch, using the Approvals Notification processor

The Approvals Notification processor uses the Electronic Document Delivery system to send e-mail messages. The Electronic Document Delivery system provides e-mail formatting options not available when using Send Distribution. Refer to the Electronic Document Delivery system for more information.

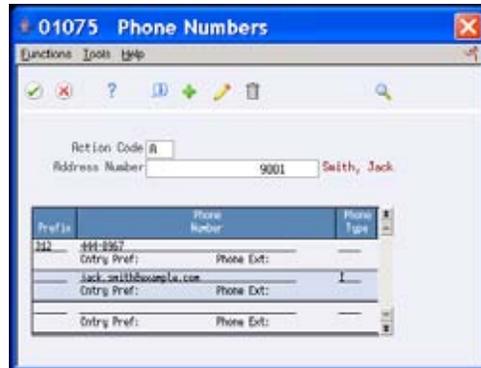
Set an e-mail Address using Send Distribution



All users in the approvals process must have an e-mail address in the Address Book system. Verify that each user has an e-mail address, and if not, you must set up an e-mail address.

1. On Address Book Revisions, locate the user.
2. Access Phone Numbers (F12).
3. Enter the e-mail address in the following field:

- Phone Number
4. Enter I (internet address) in the following field:
- Phone Type

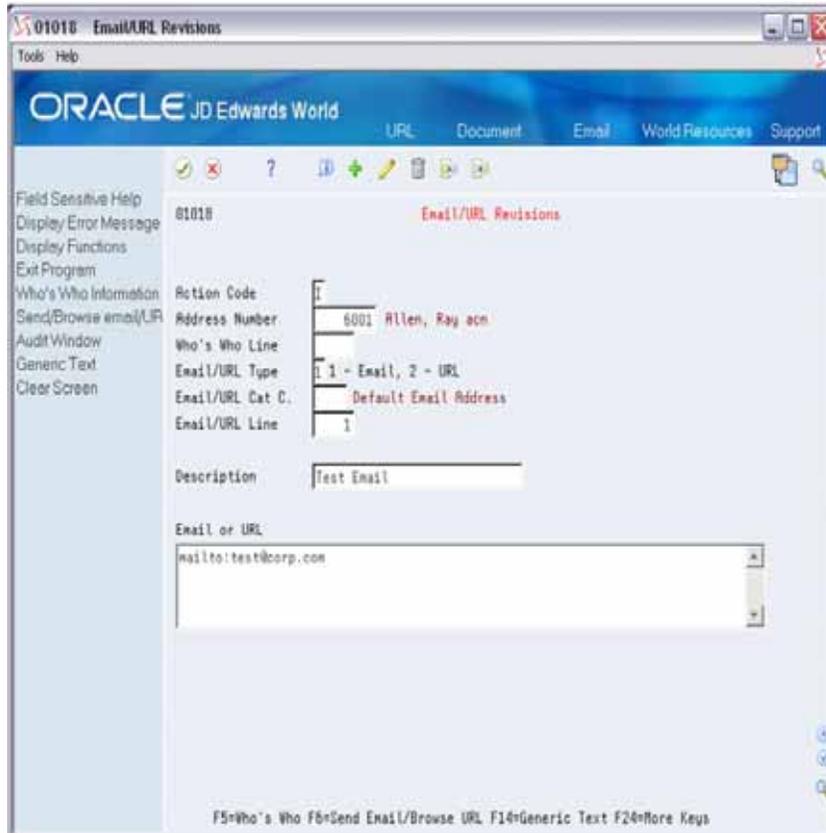


Set an e-mail Address using Approvals Notification Processor

	<p>From Master Directory (G), choose Address Book From Address Book (G01), choose Auxiliary Address Book Info From Auxiliary Address Book Information (G0111), choose Email/URL Revisions</p>
---	--

All users in the approvals process must have an e-mail address in the Address Book Email /URL addresses file (F01018). Verify that each user has an e-mail address set up as described in this section, and if not, you must set up an e-mail address.

1. Enter the Address Number.
2. Set the who's who line to '0'
3. Set the Email/URL type '1'
4. Set the Email/URL category code equal to the desired value. This must be the same values specified in the approval constants.
5. Set the Email/URL line to '1'
6. Specify a description
7. Specify an e-mail address



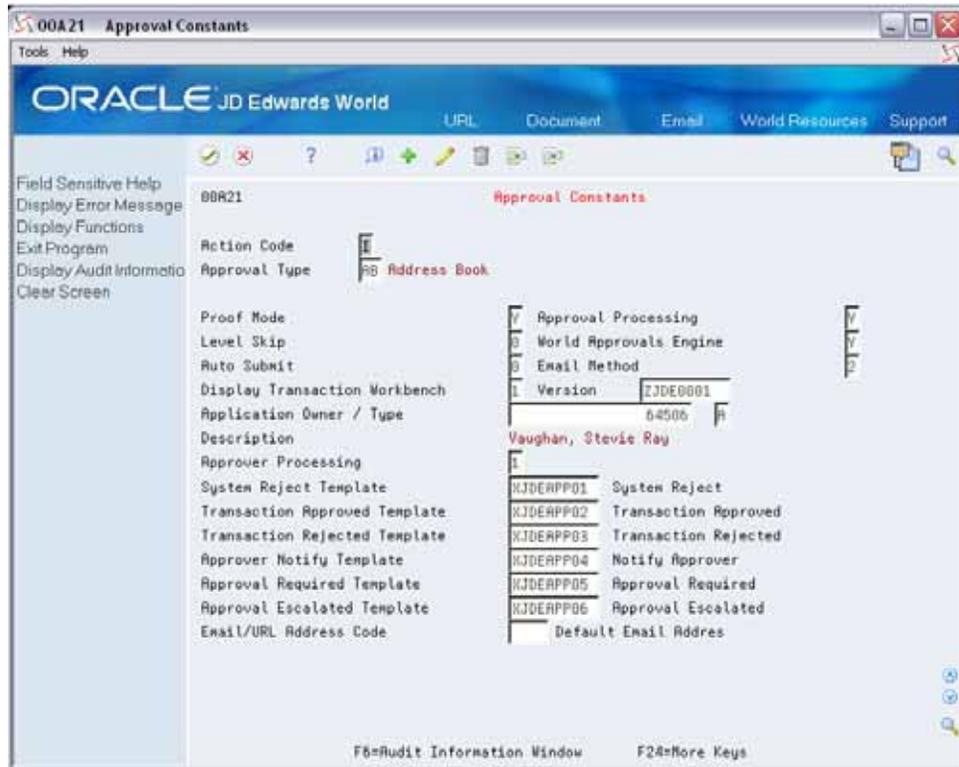
Approvals Constants Screen

	<p>From Approvals Management (G00A), choose Hidden Selection 29 From Approvals Management Setup(G00A41), choose Approval Constants</p>
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The enhancements to Approvals Management include new fields in the Approvals Constants screen. The following fields are new:

- Level Skip
- World Approvals Engine
- Auto Submit
- Email Method
- Approver Processing
- System Reject Template
- Transaction Approved Template
- Transaction Rejected Template
- Approver Notify Template
- Approval Required Template
- Approval Escalated Template

- Email/URL Address Code



Field	Explanation
Level Skip	<p>A code that designates how approval request levels are processed. Valid values include:</p> <p>0 Level skipping is not allowed. An assigned approver is not allowed to approve/reject the approval request until the approval request reaches the user level. Example: An approval request contains four levels. The approval request is at level one. An approver assigned to level three of the approval request can view the approval request but cannot approve/reject it until it reaches the user level.</p> <p>1 Level skipping is allowed. An assigned approver can approve/reject an approval request regardless of the user level.</p>
World Approvals Engine	<p>A code that determines if the World Approvals Engine is used to process approvals. *** FUTURE USE ***</p> <p style="text-align: center;"><i>Screen-specific information</i></p> <p>You must set this field to Y if Approval Processing is set to Y.</p>

Field	Explanation
Auto Submit	<p>A code that controls when a transaction gets submitted. Valid values are:</p> <ul style="list-style-type: none"> <li data-bbox="716 348 1357 405">0 The transaction is not submitted until the user manually submits it from the transaction workbench. <li data-bbox="716 428 1357 541">1 All open transactions, for the user currently accessing the system, are automatically submitted whenever the user exits the maintenance program and back to the menu. <p style="text-align: center;"><i>Screen-specific information</i></p> <p>Enter 1 to automatically submit all open transactions for a user whenever the user exits a maintenance program.</p>
E-mail Method	<p>Used to specify how the Approvals Management system sends e-mail messages. Valid values include:</p> <ul style="list-style-type: none"> <li data-bbox="716 785 1052 812">0 No e-mail messages sent. <li data-bbox="716 835 1263 892">1 E-mail messages sent in real-time using Send Distribution (SNDDST). <li data-bbox="716 915 1357 1062">2 E-mail messages sent in batch using the Approvals E-mail Notification Processor (P00A132). The Approvals Notification Processor uses the Electronic Document Delivery system (00E) to send e-mail messages.
Approver Processing	<p>This code determines how the system treats approval requests where the transaction originator is the only assigned approver. Valid values include:</p> <ul style="list-style-type: none"> <li data-bbox="716 1199 1357 1289">0 or Blank Transaction originator added to assigned approver list as the only approver. The system automatically approves the approval request. <li data-bbox="716 1312 1295 1367">1 Transaction originator and application owner(s) added to assigned.
System Reject Template	<p>Used to notify the transaction originator whenever the system rejects a transaction. An E-mail template contains the E-mail subject line and/or the body text of an E-mail. Use template XJDEAPP01 as an example. Refer to the documentation for the Electronic Document Delivery system for more information.</p> <p>This field is used only when the E-mail Method is set to 2. As a result, this field can be left blank if the E-mail Method is set to 0 or 1. In addition, you can leave this field blank if you do not want to send e-mail notification whenever a transaction gets rejected by the system.</p>

Field	Explanation
Transaction Approved Template	<p>Used to notify the transaction originator whenever a transaction gets approved. An E-mail template contains the E-mail subject line and/or the body text of an E-mail message. Use template XJDEAPP02 as an example. Refer to the documentation for the Electronic Document Delivery system for more information.</p> <p>This field is used only when the E-mail Method is set to 2. As a result, this field can be left blank if the E-mail Method is set to 0 or 1. In addition, you can leave this field blank if you do not want to send e-mail notification whenever a transaction gets approved.</p>
Transaction Rejected Template	<p>Used to notify the transaction originator whenever a transaction gets rejected. An E-mail template contains the E-mail subject line and/or the body text of an E-mail message. Use template XJDEAPP03 as an example. Refer to the documentation for the Electronic Document Delivery system for more information.</p> <p>This field is used only when the E-mail Method is set to 2. As a result, this field can be left blank if the E-mail Method is set to 0 or 1. In addition, you can leave this field blank if you do not want to send e-mail notification whenever a transaction gets rejected.</p>
Approver Notify Template	<p>Used to notify the assigned approver whenever an approval request gets created and/or the approval request reaches the approver's level. This e-mail template is used when the approver's role is set to 'N'. An E-mail template contains the E-mail subject line and/or the body text of an E-mail message. Use template XJDEAPP04 as an example. Refer to the documentation for the Electronic Document Delivery system for more information.</p> <p>This field is used only when the E-mail Method is set to 2. As a result, this field can be left blank if the E-mail Method is set to 0 or 1. In addition, you can leave this field blank if you do not want to send e-mail notification to assigned approvers with a role set to N.</p>
Approval Required Template	<p>Used to notify the assigned approver whenever an approval request gets created and/or the approval request reaches the approver's level. This E-mail template is used when the approver's role is set to 'A'. An E-mail template contains the E-mail subject line and/or the body text of an E-mail. Use template XJDEAPP05 as an example. Refer to the documentation for the Electronic Document Delivery system for more information.</p> <p>This field is used only when the E-mail Method is set to 2. As a result, this field can be left blank if the E-mail Method is set to 0 or 1. In addition, you can leave this field blank if you do not want to send e-mail notification to assigned approvers with a role set to 'A'.</p>

Field	Explanation
Approval Escalated Template	<p>Used to notify the transaction originator, all assigned approvers, and all application owners whenever an approval request gets escalated. An E-mail template contains the E-mail subject line and/or the body text of an E-mail message. Use template XJDEAPP06 as an example. Refer to the documentation for the Electronic Document Delivery system for more information.</p> <p>This field is used only when the E-mail Method is set to 2. As a result, this field can be left blank if the E-mail Method is set to 0 or 1. In addition, you can leave this field blank if you do not want to send e-mail notification whenever an approval request gets escalated.</p>
Email Category Code	<p>Use the E-mail/URL Address Code to specify the e-mail category code to use when retrieving e-mail addresses from the E-mail/URL Addresses file (F01018).</p> <p>This field is used only when the E-mail Method is set to 2. As a result, this field can be left blank if the E-mail Method is set to 0 or 1.</p>

Configuring Approvals Management

You must configure Approvals Management system to meet your business requirements. You must configure the groups for approval processing as well as the routes each approval takes in the Approvals Management system. You must also set up rules for each approval request and the schedules, which are the rules for each transaction type.

Complete the following tasks:

- [To convert purchase order approval levels to approvals management purchase order approval rule sets](#)
- [To configure approval rule set calculation](#)

Convert Purchase Order Approval Levels to Approvals Management Purchase Order Approval Rule Sets

	<p>From Approvals Management (G00A), choose Hidden Selection 29 From Approvals Management Setup (G00A41), choose PO Approval Conversion</p>
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You can use PO Approval Conversion (P00A43CNV) to convert your purchase order approval levels (F43008) to approvals management purchase order approval rule sets. PO Approval Conversion uses data selection to combine one or more purchase order approval levels into one approvals management rule set.

PO Approval Conversion creates the following approvals management rule sets:

- XJDE0001 - Purchase order header equivalent rule set
- XJDE0002 - Purchase order header equivalent budget approver rule set
- XJDE0003 - Purchase order detail equivalent rule set
- XJDE0004 - Purchase order detail equivalent budget approver rule set

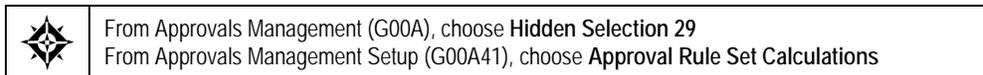
PO Approval Conversion deletes and regenerates these rule sets. JD Edwards World strongly recommends that you rename these rule sets after running PO Approval Conversion to avoid any data loss.

PO Approval Conversion must be used as a starting point when converting from the previous purchase order approval system. You must review the resulting rule sets and make any necessary modifications before implementing them in your live environment.

Processing Options

See Approval Conversion (P00A43CNV).

Configure Approval Rule Set Calculations

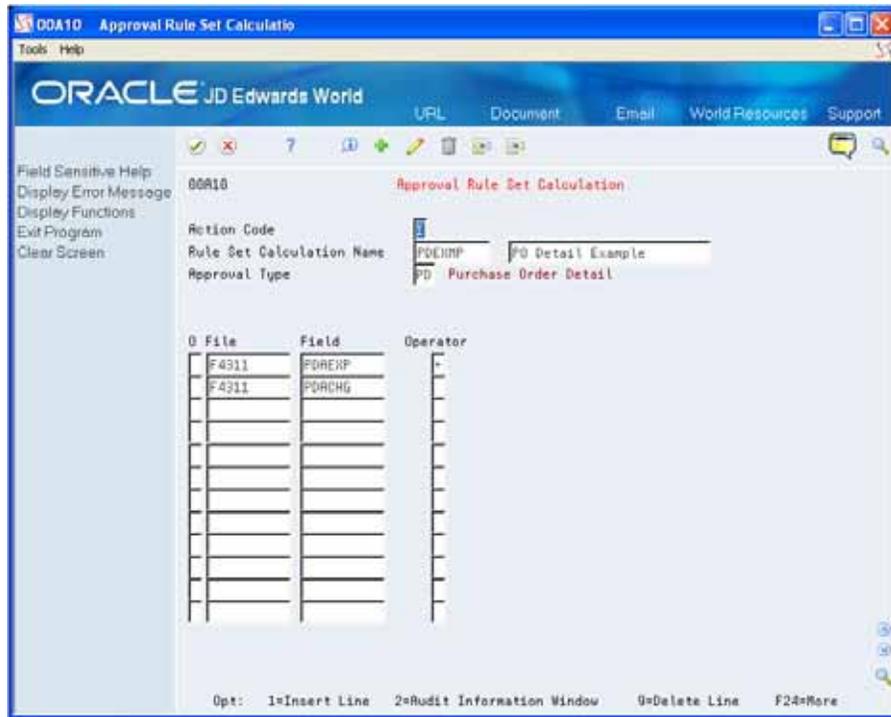


You use the approval rule set calculations to define simple mathematical rules based on fields within a single record. For example, you might want to create a purchase order rule based on the addition of the extended price and amount on hold. You create an approval rule set calculation that sums the extended price and amount on hold, then use the calculation when defining your purchase order rule.

You use the Approval Rule Set Calculation program (P00A10) to do so. The system stores the approval rules in the Approval Schedule file (F00A10).

1. On Approval Rule Set Calculation, complete the following fields:

- Rule Set Calculation Name
- Description
- Approval Type
- File
- Field
- Operator



Processing Approvals

As users make changes to records in the approvals management system automatically creates a unique transaction number to track changes throughout the approvals process.

The transaction number and type appear at the bottom of a revisions screen during inquiry. JD Edwards World determines which revisions programs are part of the approvals management process.

The following programs are Purchase Order revision programs:

- Enter Purchase Orders P4310
- Purchase Order Detail P4311

Address Book Approvals

There are three types of transactions; Add, Change, and Delete. These transactions are an entity in the system, which consists of a group of records in multiple related files. Add transactions involve the addition of a new entity to the system. For example, when a user adds an Address Book entry it becomes a new record in the Address Book Master (F0101) file and might also contain information in a related record such as Address Book Who's Who (F0111). Change transactions involve any changes a user makes to the entity, including the addition and deletion of any records related to the entity. For example, in the Address Book system, a change transaction might include any changes a user makes to the F0101 record, any changes to a related record such as Address Book Who's Who (F0111) or Address

Book - Contact Phone Numbers (F0115), or the addition or deletion of any other related record. Delete transactions involve the deletion of an entity in the system. For example, in the Address Book system, a delete transaction might involve deleting the Address Book entry itself, or the F0101 record.

Only one open transaction can exist per user (the user that originates the change) and entity. The system stores the entities from a revisions program in the approval work files. The system does not move the entities to production until a user submits the transaction and the appropriate individual approves the transaction. However, if the user accesses a revisions program from another program, not from the menu, the system enters the changes directly into production and these changes bypass all approval processing. For example, you can access the Address Book Addition window from Sales Order Entry (P4210). JD Edwards World recommends that you disable access to the revisions programs using function key security when approvals processing is active.

Purchase Order Approvals

Purchase Order Approval is divided into two approval types:

- Purchase Order Header
- Purchase Order Detail

You can choose to run header approval only, detail approval only, or both. Each approval type contains one transaction type. Purchase order header transactions involve any type of change (add or change) to a purchase order, including the header and detail. Only one open header transaction can exist per purchase order. Purchase order detail transactions involve any type of change (add or change) to a purchase order detail line. Only one open detail transaction can exist per purchase order detail line.

Changes made to a purchase order are written directly to production files. The purchase order detail statuses (Next Status and Last Status) are used to reflect the order's progress through the approval process. A processing option exists in P4311, P4242, and P4243 for each of the following purchase order detail line statuses used by the approvals management system:

Open status

The Open status defines the beginning of the approval process. Any Detail line at this status is eligible for approval consideration. The Approvals management system creates an open transaction for lines at this status.

Pending Approval status

The Pending Approval status represents a detail line that is currently being considered for approval by one or more approvers. The system sets the detail next status to this status when the approvals management transaction is submitted for approval and the system determines that the detail line requires approval. This status is used when detail level approval is turned on.

Rejected status

The system sets the next status to the Rejected status whenever one of the assigned approvers rejects the detail line in the Approvals Management system. This status is used when detail level approval is turned on.

Approved/Pending Header Approval status

This status represents a detail line that is been approved at the detail level and is waiting for header level approval. The system sets the next status to the Approved/Pending Header Approval status when the detail line gets approved in the Approvals Management system. This status is used when header level approval is turned on. The header transaction can't be submitted until all detail lines are equal to or greater than this status.

Approved/Header Rejected status

This status represents a detail line that is been approved at the detail level and rejected at the header level. The system sets the next status to the Approved/Header Rejected status when the header gets rejected in the Approvals Management system. This status is used when header level approval is turned on.

Approved status

The Approved status represents a detail line that is been approved at the detail and header level. A purchase order is considered to be approved once all detail lines have reached the approved status.

Expedite Approval Request

Systems with multiple levels of approval such as purchase order approval allow approval requests to be expedited, bypassing any remaining levels of approval. For example, purchase order approval allows for header and detail level approval. If you have header and detail level approval turned on you can expedite an approval request at the detail level, sending the detail line to an approved status, bypassing header level approval.

Processing Approvals

The enhancements to Approvals Management added four procedures to process approvals in the JD Edwards World Approvals Management system.

- [Review transaction messages](#)
- [Send Email Notification](#)
- [Run Transaction Report](#)
- [Run Approval Request Report](#)

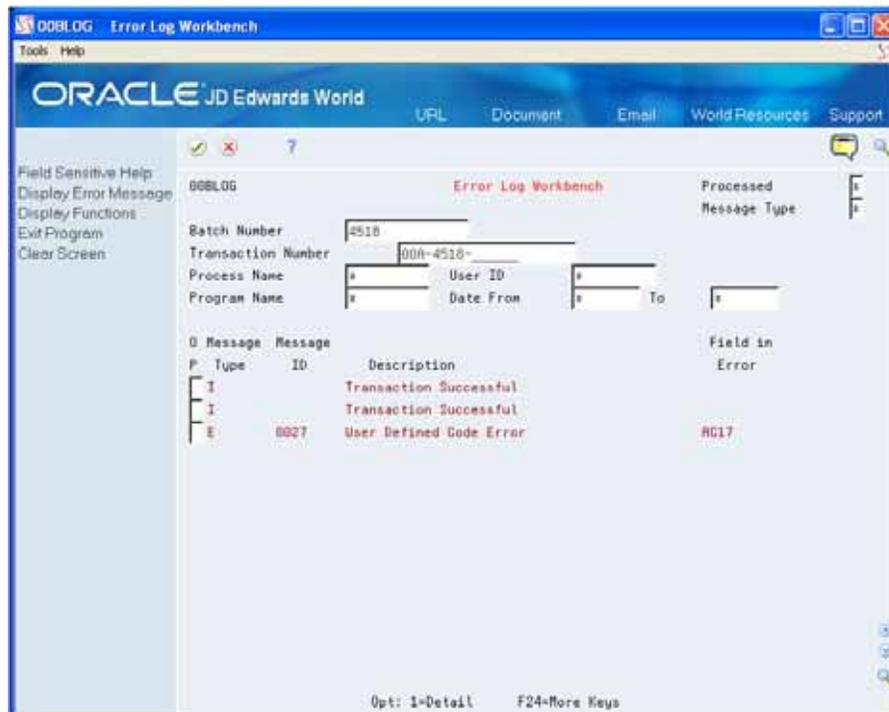
Review Transaction Messages



From Approvals Management (G00A), choose **Batch Log Workbench** or choose **Option 6** from the Transaction or Approval Workbench

The Batch Log Workbench (P00BLOG) displays information from the Error Log Table for Batch Processes file (F00BLOG). You can search on messages related to a specific transaction or process using the search fields in the header section of the Batch Log Workbench. The Error Log Table for Batch Processes file is a generic log file used by many different processes within World software. Some of the fields in the file as well as some of the fields in the Batch Log Workbench are not used by the Approvals Management system.

- On Batch Log Workbench, complete any of the following fields:
 - Processed
 - Message Type
 - Batch Number
 - Transaction Number
 - Process Name
 - User ID
 - Program Name
 - Date From
 - Date To



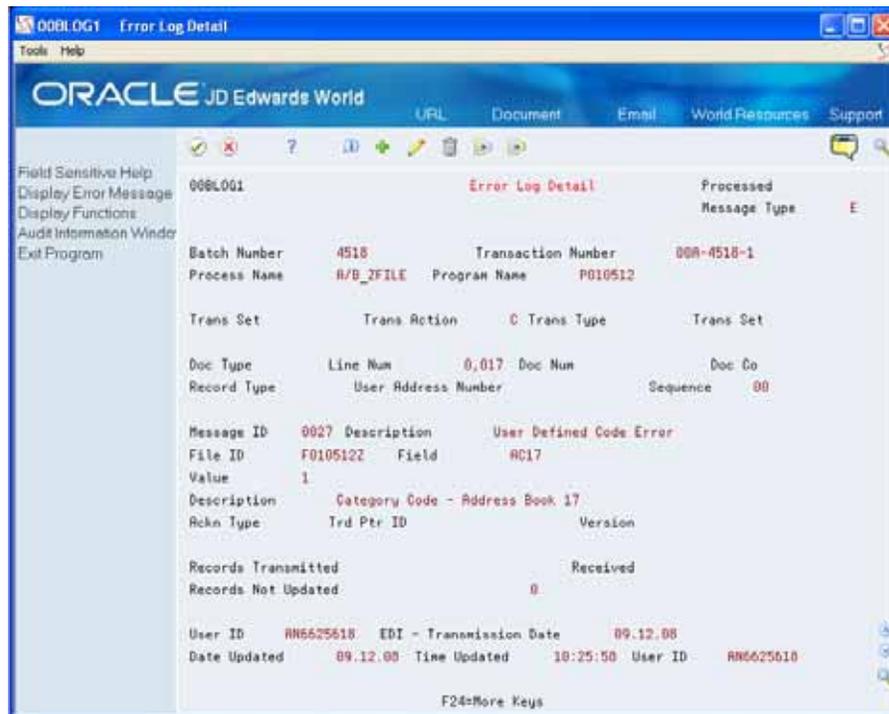
Complete the following field:

- Option

The following field explanations apply to messages generated from approvals management transaction processing.

Field	Explanation
Processed	Leave the processed field blank. Approvals management does not use the processed flag.
Message Type	<p>The following list describes the message types used Approvals Management.</p> <p>I – Information.</p> <p>E – Error.</p> <p>W – Warning.</p>
Batch Number	<p>The Approvals Management system sets the batch number equal to the transaction number, left justified, without any leading zeros.</p> <p>Use a '%' anywhere in the field to represent any number of characters. Use a '_' anywhere in the field to represent a single character.</p>
Transaction Number	<p>The Approvals Management system sets the transaction number equal to the 00A followed by the transaction number without leading zeros followed by the transaction commit sequence. The transaction commit sequence increments by on each time the transaction gets submitted.</p> <p>Example: 00A-4518-1</p> <p>Use a '%' anywhere in the field to represent any number of characters. Use a '_' anywhere in the field to represent a single character.</p> <p>Example: Use 00A-4518-_____ to show all messages for transaction 4518.</p>
Process Name	<p>Approvals Management uses various processes such as address book Z file when processing transactions. Use the Process Name to limit messages to a specific process.</p> <p>Use a '%' anywhere in the field to represent any number of characters. Use a '_' anywhere in the field to represent a single character.</p>
User ID	<p>Use the User ID to limit messages based on a specific user.</p> <p>Use a '%' anywhere in the field to represent any number of characters. Use a '_' anywhere in the field to represent a single character.</p>

Field	Explanation
Program Name	Use the Program Name to limit messages based on a specific program. Use a '%' anywhere in the field to represent any number of characters. Use a '_' anywhere in the field to represent a single character.
Date From and To	Use the From and To date to limit messages based on a date range.
Option	1 - Detail. Enter a 1 to view the message detail.

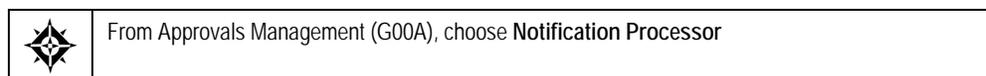


- Enter 1 in the option field on the Batch Log Workbench to display the message detail.

Processing Options

See Batch Log Workbench (P00BLOG).

Send Email Notification



Approvals management sends e-mail notifications based on the e-mail method defined in the approvals management constants (P00A21). If the e-mail method is set to zero, no e-mail messages are sent from the approvals management system. If the e-mail method is set to 1, e-mail messages are sent in real-time using Send Distribution. If the e-mail method is set to 2, e-mail messages are sent in batch using the Approvals Notification Processor (P00A132).

If you choose to send e-mail messages in batch, you must schedule the Approvals Notification Processor to run at defined intervals using Unattended Night Operations (G9643).

Note: You can skip this step if you set the Email Method to 0 or 1.

Processing Options

See Approvals Notification Processor (P00A132).

Run Transaction Report

	From Approvals Management (G00A), choose Approvals Management Reports From Approvals Management Reports (G00A1), choose Transaction Report
---	---

This report contains information related to approvals management transactions. The system stores this information in the Approvals Transaction File (F00A11), Approval Request File (F00A12), and the Assigned Approvers List File (F00A13).

Use processing options to display the following.

- **Transaction Detail** – The transaction detail contains a listing of the from and to values for every field involved in the transaction
- **Assigned Approvers** – A list of assigned approvers displays for every transaction assigned to an approval request

00A114	J.D. Edwards World			Page - 1
	Approvals Mgmt Transaction Rpt			Date - 9.12.08

Transaction Key: 00072830				
Originator: 56493 Smith, Frank	Type: AC	Status: Error	Number: 4518	
Transaction Detail				

F0101 Record Changed				

Address Number: 72830				
Alpha Name: acn test delete				

Field Level Detail				

Field Name	From Value	To Value	Date	

Category Code 17		1	09.12.08	
Work Station ID	QPADEV0247	QPADEV0153	09.12.08	
Program ID	P01051	P010512	09.12.08	
Date Updated	28.10.08	09.12.08	09.12.08	
Time Last Updated	12:48:19	10:02:05	09.12.08	
No Approval Available				

Processing Options

See Processing Option (P00A114).

Run Approval Request Report

	From Approvals Management (G00A), choose Approvals Management Reports From Approvals Management Reports (G00A1), choose Approval Request Report
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This report contains information related to approvals management transactions. The system stores this information in the Approvals Transaction File (F00A11), Approval Request File (F00A12), and the Assigned Approvers List File (F00A13).

Use processing options to display the following:

- Transaction Detail – The transaction detail contains a listing of the from and to values for every field involved in the transaction
- Assigned Approvers – A list of assigned approvers displays for every transaction assigned to an approval request

This report is based on a logical file joining the Approvals Transaction File, Approval Request File and Assigned Approvers List File. You can use data selection on any one of the listed files to display the desired information.

Note: Only transactions that are assigned to an approval request, appear in this report.

00A115		J.D. Edwards World			Page - . . . 1	
		Approvals Mgmt Approvals Rpt			Date - . . . 9.12.08	

Transaction Key: 00072830						
Originator:	56493 Smith, Frank	Type: AC	Status: Pending	Number:	4521	
Transaction Detail						

F0101 Record Changed						

Address Number: 72830						
Alpha Name: acn test delete						

Field Level Detail						

Field Name	From Value	To Value	Date			

Geographic Region	100	300	09.12.08			
Work Station ID	X00A112	QPADEV0153	09.12.08			
Time Last Updated	16:13:09	16:14:42	09.12.08			

Approval Request Information						

Status: Pending	Date Created: 09.12.08	Current Level: 1	Number:	1812		
Assigned Approvers						

Address Number	Name	Action	Req Date	Rsp Date	Outstanding	Level Role

64506	Vaughan, Stevie Ray	Pending				1 A

Processing Options

See Processing Option (P00A115).