Advania Approvals

Setup and instructions

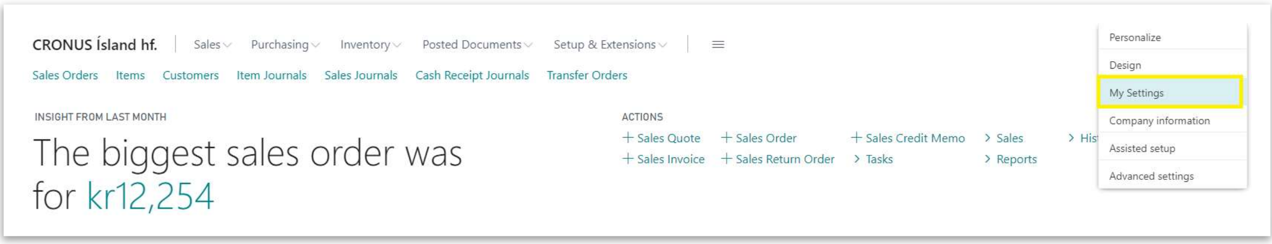
Advania Approvals

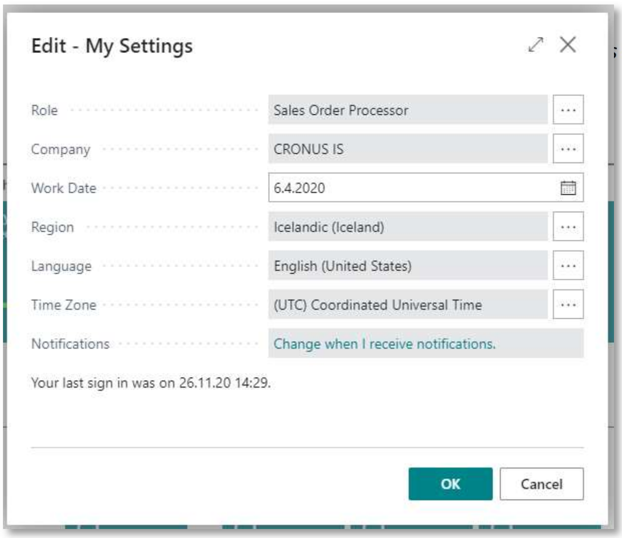
1. About Advania Approvals

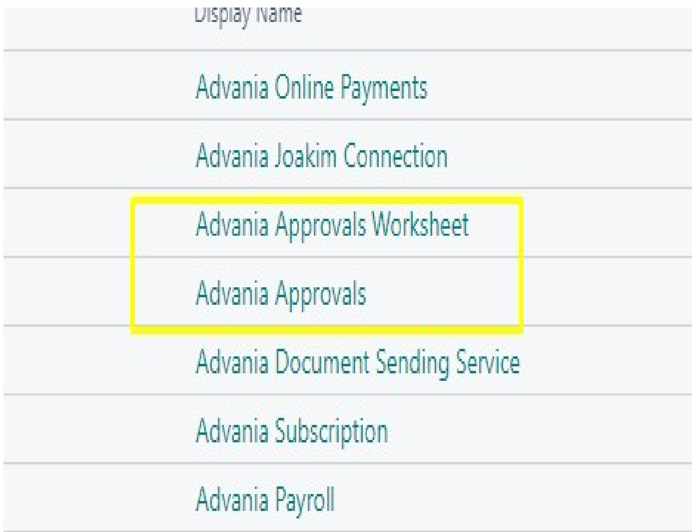
Advania Approvals solution extends standard Business Central Approval functionalities. It provides new abilities and makes work easier.

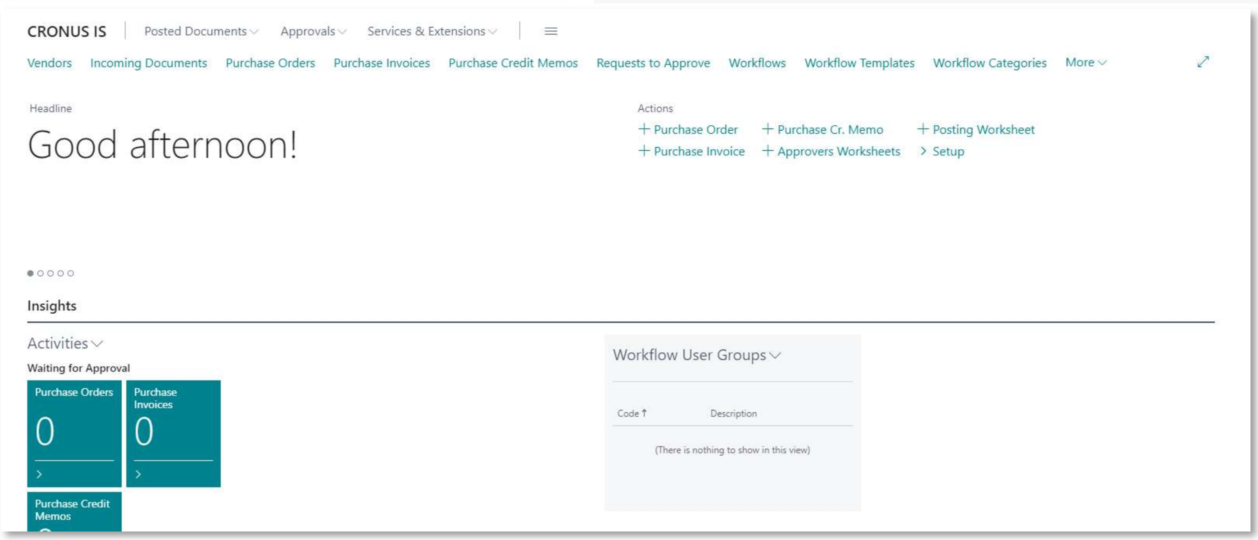
The most solution functionalities are available from corresponding role center, which can be selected from *Available Roles* page.

There are two available roles. Go to *My Settings* and for *Role* field from *Available Roles* choose *Advania Approvals.*





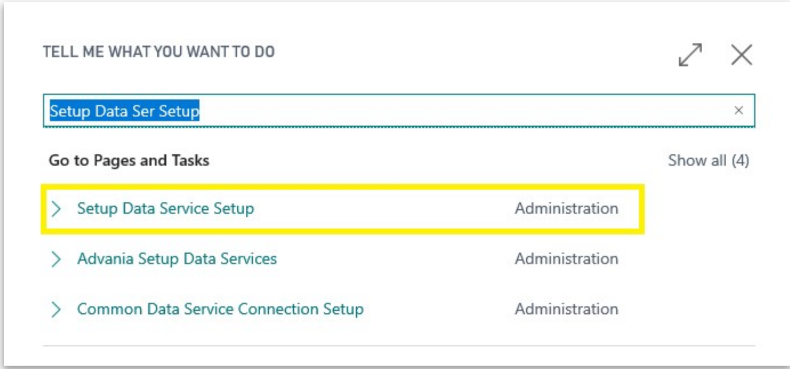




2. SETUP OF ADVANIA SETUP DATA SERVICES

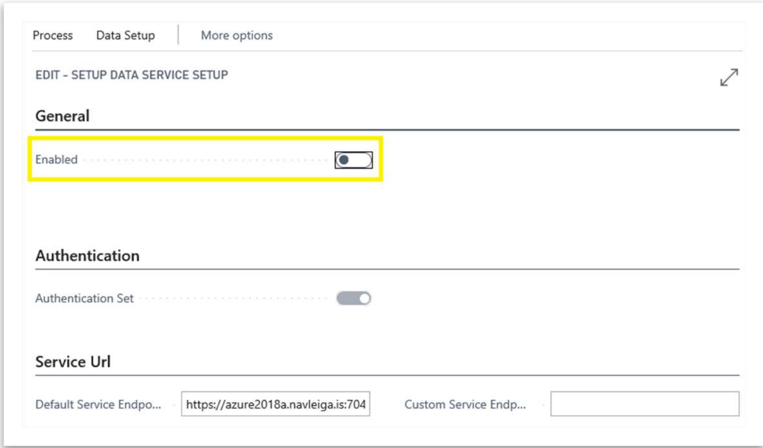
To make our and customers lives easier, Advania developed *Setup Data Services* solution which can download and setup all necessary data for solutions. Following the steps below, setup data will be downloaded for standard tables, so even if database is empty, with downloaded data *Business Central* will be prepared for working.

1. On the Home Page, click Search icon and type **Setup Data Services Setup**



"Tell me" PROVERI

2. Click Advania Setup Data Services and set *Enabled* to true.:



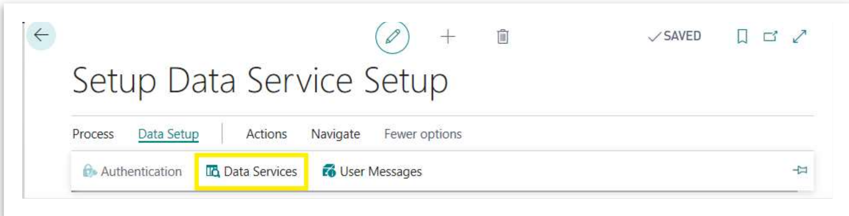
Setup Data Services Setup

In case that *Setup Data Service* functionality is not enabled and there is no *Registration No.* in *Company Information* table, confirmation dialog will pop up:

Registration No. needs to be filled on *Company Information* page in so the system can be able to download the data.

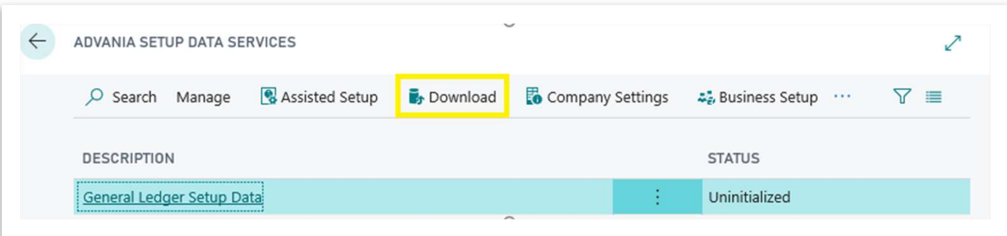
***Important:** For testing purpose **Registration No. 5902697199** will be used, to be able to download.*

3. Run *Data Services* action:



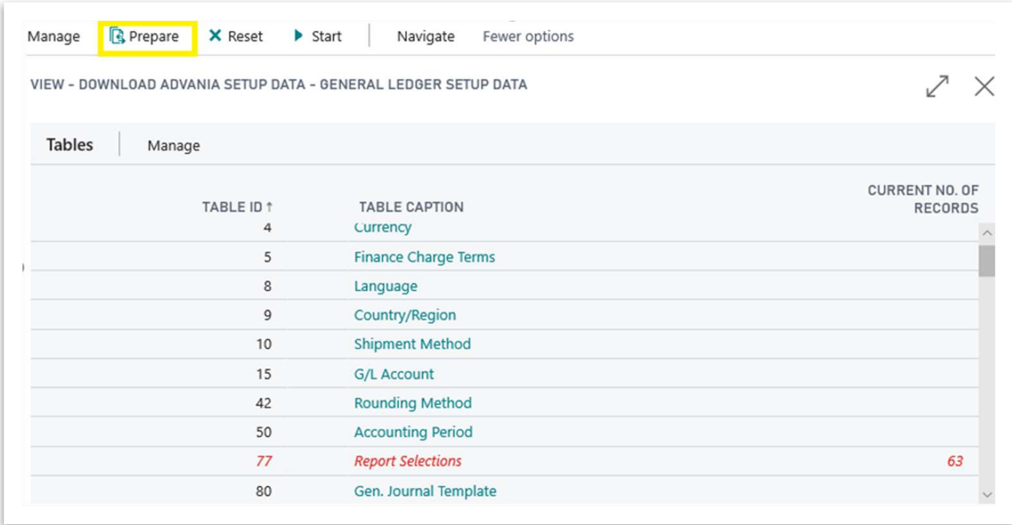
Setup Data Services Setup

4. *Setup Data Service Setup* page is opened, click on *Download* action to open the Download page:



Advania Setup Data Services

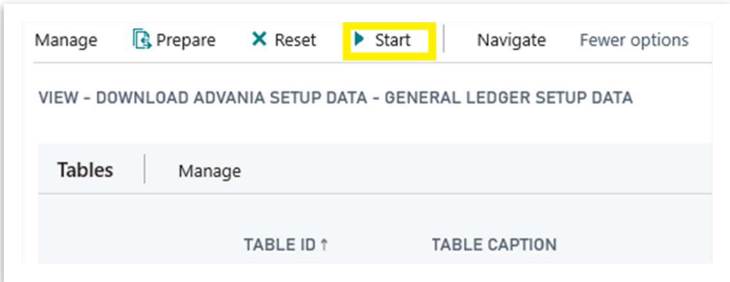
5. Click Prepare page action to download the list of tables that are going to be filled in after the download:



Download Advania Setup Data

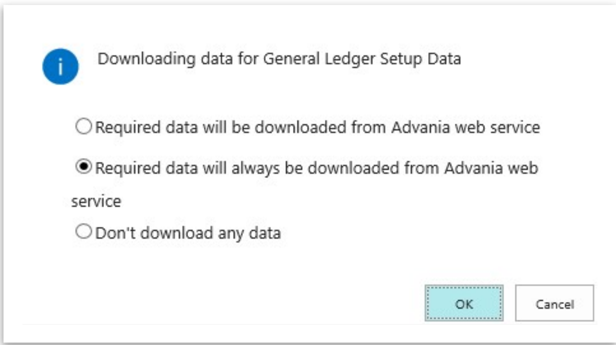
The tables that are empty are colored in green. On the other hand, tables that already have some records, are colored in red.

6. Once the table list is prepared, click on Start page action to run the setup data download.

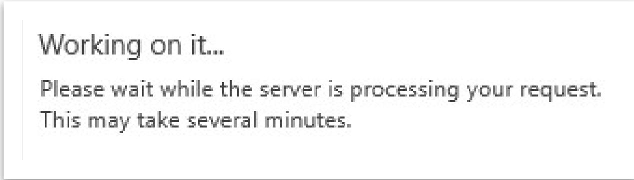


Download Advania Setup Data

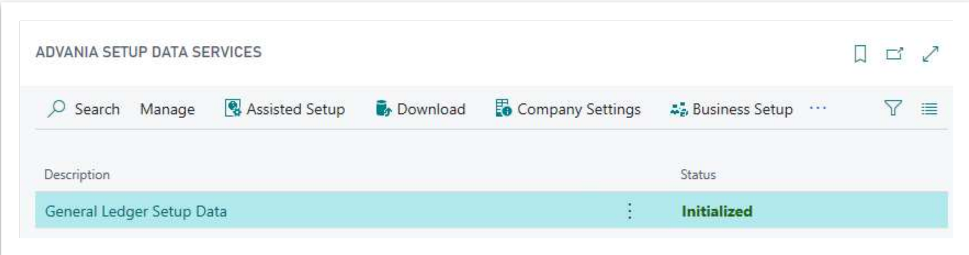
Choose whether the data will be downloaded from Advania web service once, always or cancel the download by selecting one of the following options:



Wait until the system finishes the download:



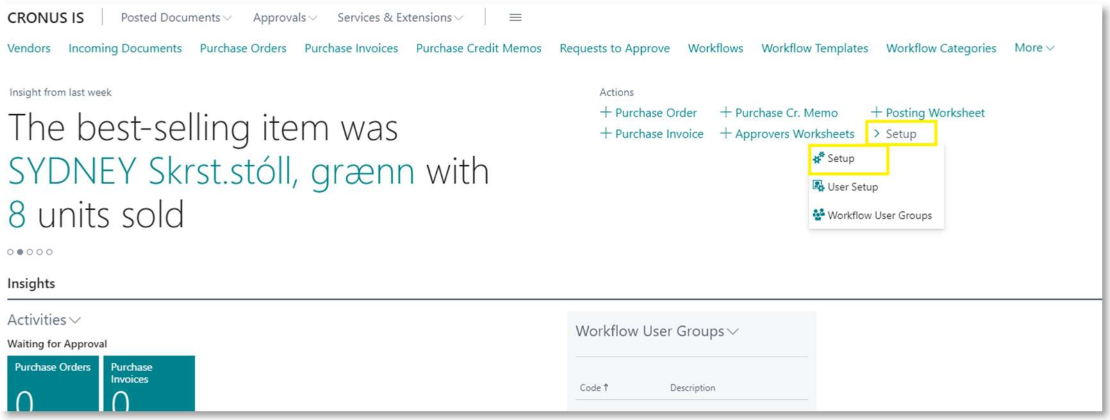
7. Check if all tables in the list are colored in red, which means that data was downloaded. Close *Download Advania Setup Data* page. After the data was downloaded, *General Ledger Setup Data* will have status Initialized:



Advania Setup Data Services

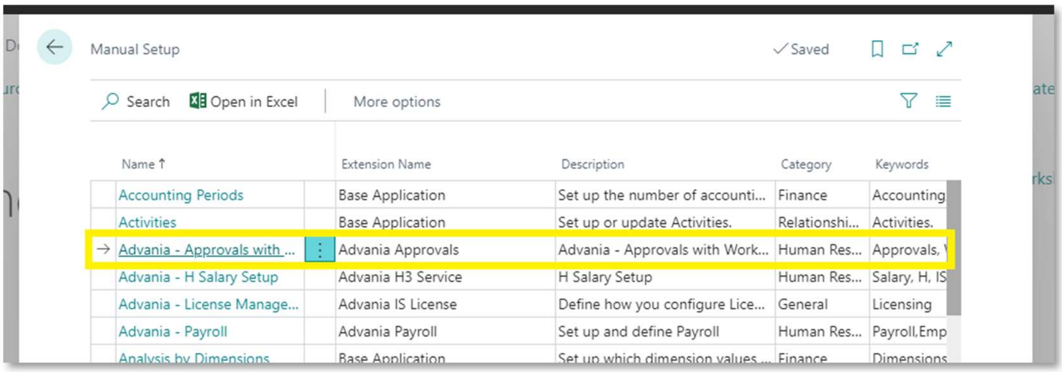
3. Setting up Advania Approvals

To start using a solution, *Approvals* solution needs to be enabled in *Approvals Setup* page. *Approvals Setup* can be accessed from Role Center under *Setup* area.



Approvals - Role Center

Or from *Manual Setup* page, choosing related link.

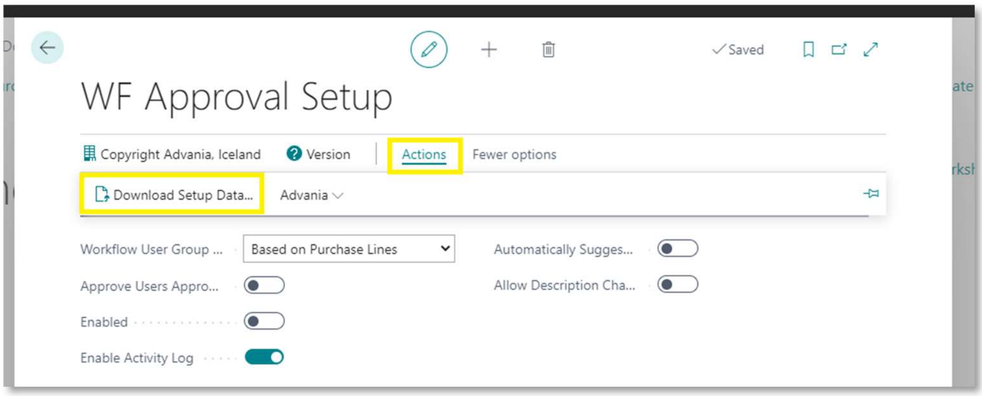


Manual Setup

Setup page will be shown.

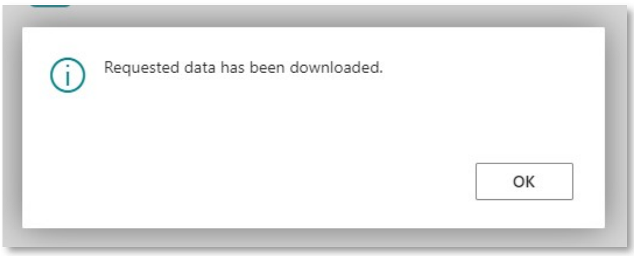
Download Approvals data from Setup Data Services

Before start using system you have to download all necessary data. It can be done using *Download Setup Data* action.

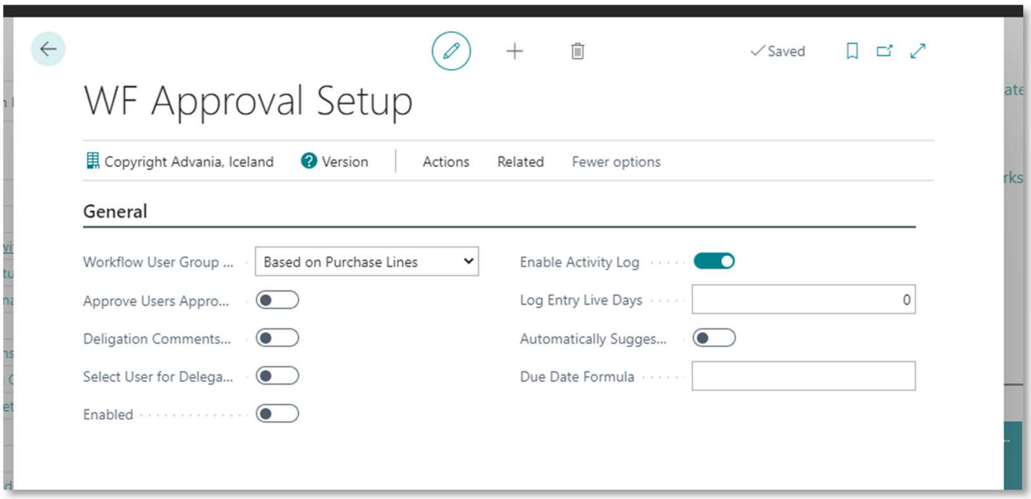


Download Setup Data

After successful download confirmation message is shown.



Approvals Setup



Approvals Setup

In the tab ***General*** you may find fields:

- **Workflow User Group Suggestion** - This selection is used when suggesting a workflow user group for a purchase. Based on this selection either the purchase header or the purchase lines are evaluated.

- **Approve Users Approval Request** - If selected then all approval entries created for the current user will automatically be approved.

- **Delegation Comments Required** - If selected then user must add a comment to the approval entry before delegating the approval.

- **Select User for Delegation -** If selected then user gets to select another user when delegating the approval.

- **Enable Activity Log** – activates activities tracking

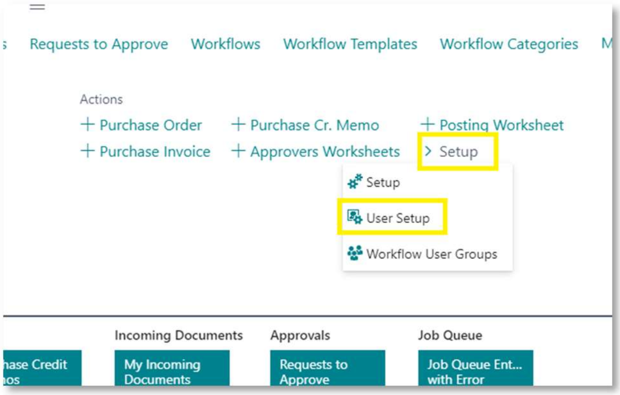
- **Log Entry Live Days** – date formula that defines which records will be deleted after performing *Delete Entries* action from *Workflow Activity Log* page

- **Automatically Suggest Workflow User Group** – if this field is checked system will automatically suggest Workflow User Group on documents during creation process

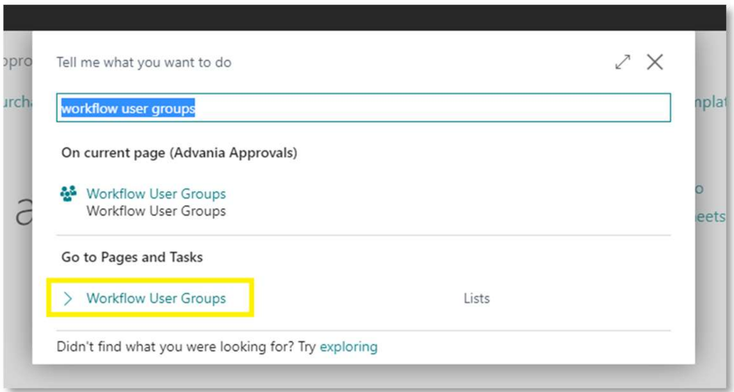
- **Due Date Formula** - Specified the formula that defines date that is used to decide when to send Overdue Approval Notification on Purchase Documents.

Approval User Setup

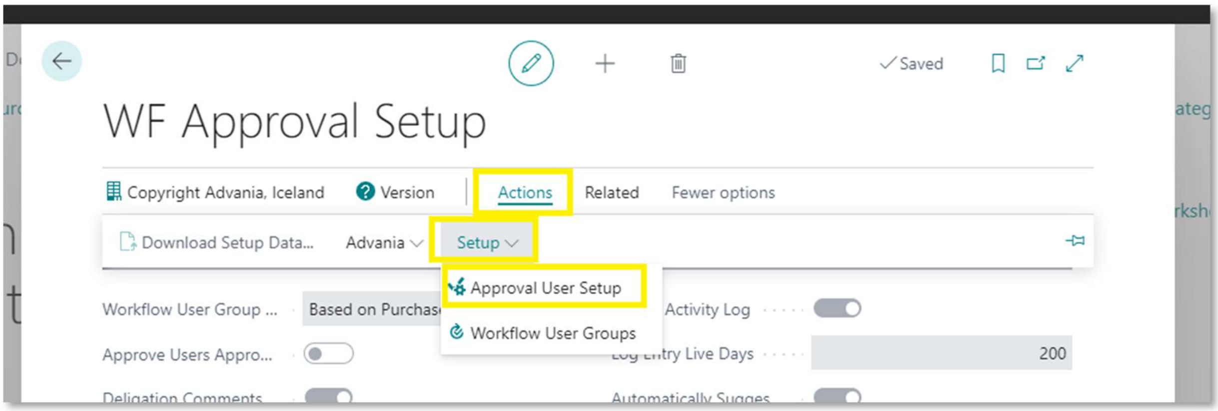
There are many different ways of accessing *Workflow User Groups*.



Accessing from Role Center

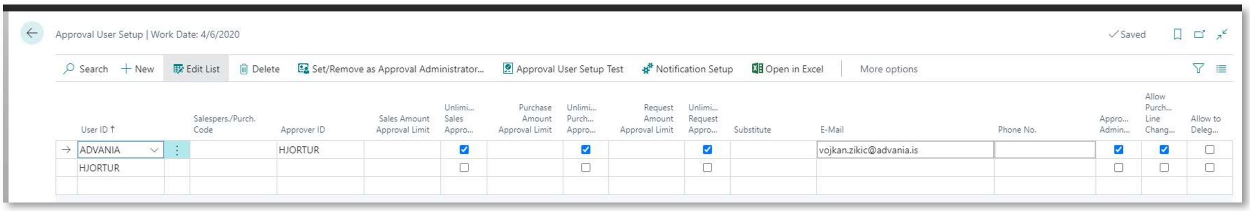


*Accessing using **Tell me** function*



Accessing from Approval Setup page

Approval User Setup page opens.



Approval User Setup

Next to the fields which come with standard BC Aprrovals system (such as amount limits that user can accept etc.) you may find next fields:

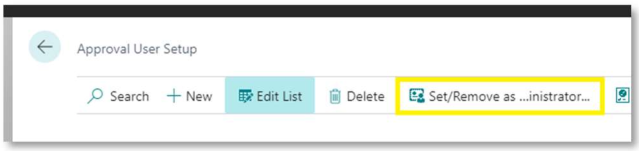
Allow Purchase Line Changes – selected user gets privilegy to change lines in purchase documents

Allow to Delegate – selected user gets privilegy to delegate request

Approval Administrator

In the standard system it could be only one approval administratior but in this solution you can add as many as you want using action *Set/Remove as Approval Administrator*. This action is also used for removing this privilegy.

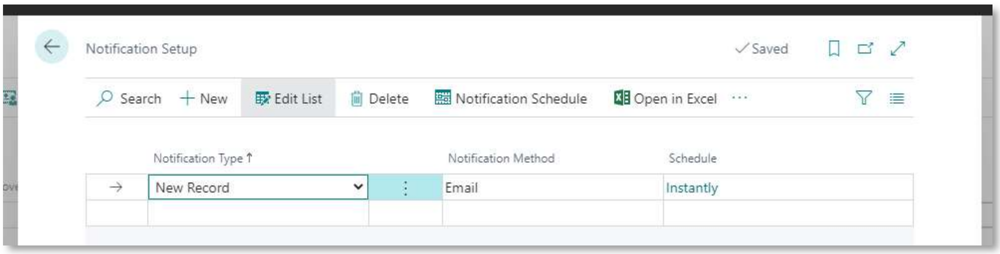
Only approval administrators have abillity to work with *Posting Worksheet*.



Action for set or remove approval administrator

Notification Setup

Approver can be inform about new approval request by e-mail or note. This can be set up under *Notification Setup* page,



Notification Setup page

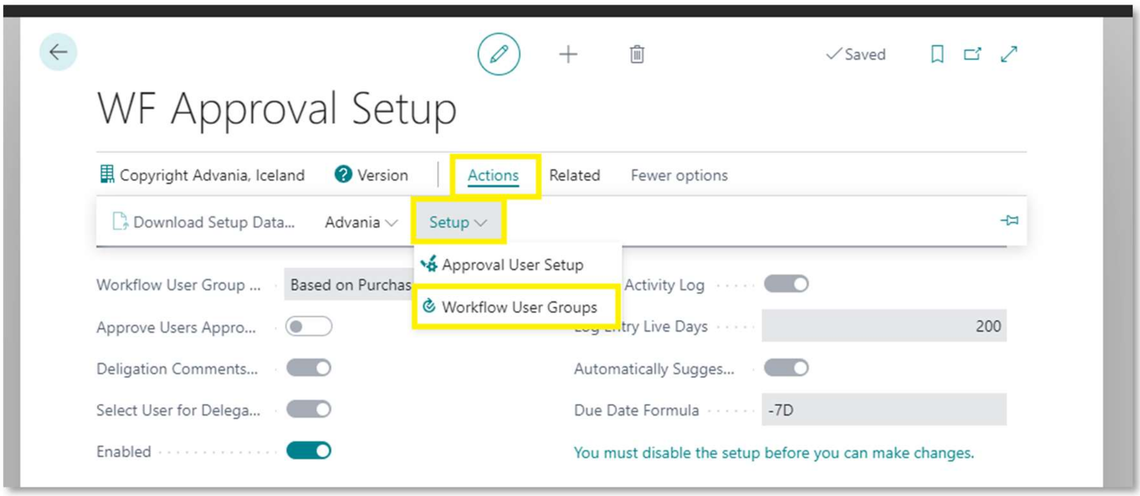
In this case, user will get e-mail notification for every new approval request (*E-mail* field in the *Approval User Setup* has to be populated). This is the default configuration so you do not need to change anything here.

NAS Works Codeunit 1509 activates automatically and starts running - you can configure it to your liking .

***Note*: A general SMTP setup must be in place so that an email can be sent as a reminder when an invoice is sent for approval and as when a reminder email is sent**

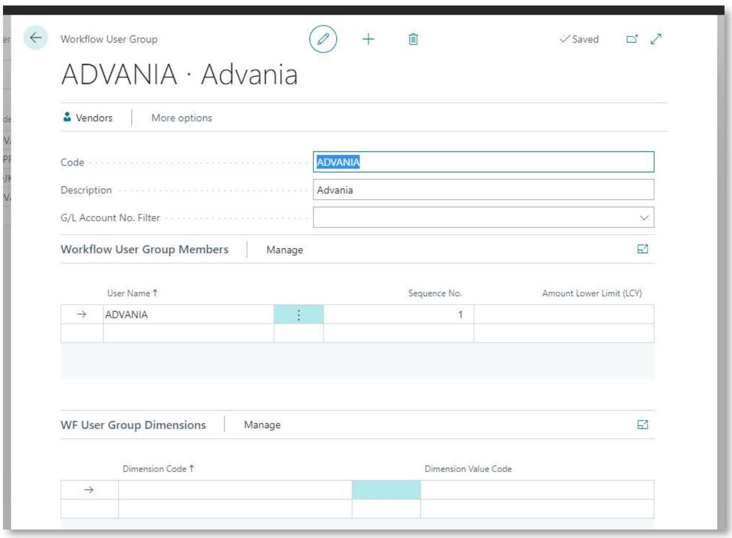
Worflow User Groups

You can access *Workflow User Groups* page from setup page.



Accessing Workoflow User Group page

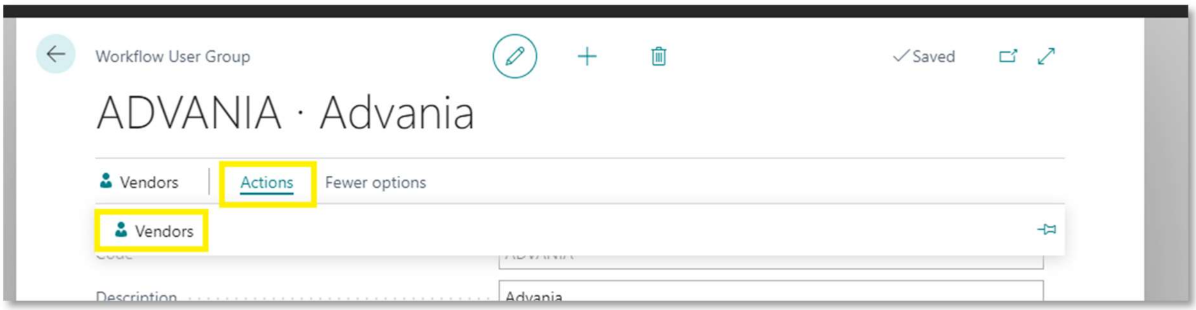
Workflow User Groups list opens. Add new *Workflow User Group* by cliking on action **New**. You have to define *Code*, *Description* and *User Name* on *Workflow User Group* card.



Workflow User Group page

If we use [funcionality]() for automaticaly *Workflow User Group* suggestion we have to define suggestion parameters. Sugesstion can be made by *Vendor No, G/L Account No. Filter* or *Dimensions*. For example – if we type 22300 into *G/L Account No. Filter* this *Workoflow User Group* will be automatically assigned for every row in purchase document that have this G/L account typed into *No.* field. If all three parameters are defined the highest priority will have Vendor No. and the lowest priority will have Dimensions.

You may define *Vendors* by going to **Actions** → **Vendors**

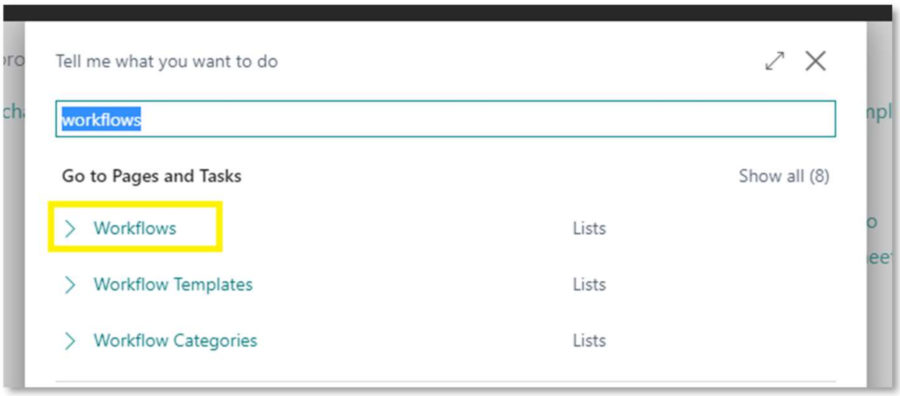


Defining Vendor No. values for automatically suggestion

Workflows

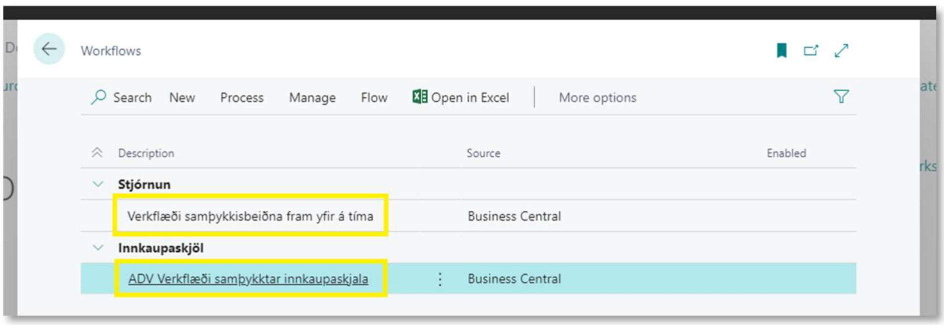
Workflows represent predefined paterns for some activities.

Start by typing *Workflows* into *„tell me“* search bar and go to *Workflows* list



„Tell me“ search bar

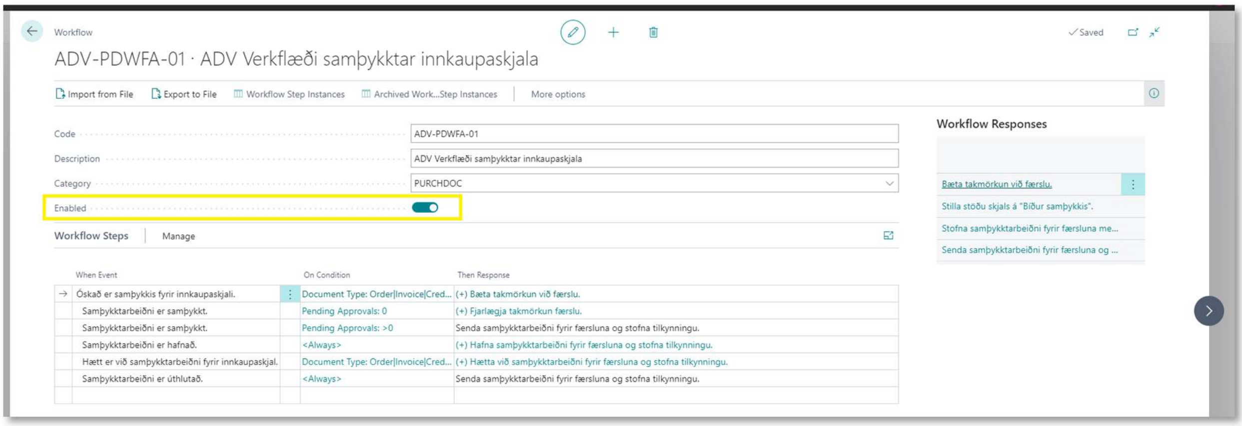
You may find two custom made workflows in the *Wokflow* list



Wokflow list

Guðrúnartún 10 I 105 Reykjavík I sími: 440 9000 I advania@advania.is I www.advania.is

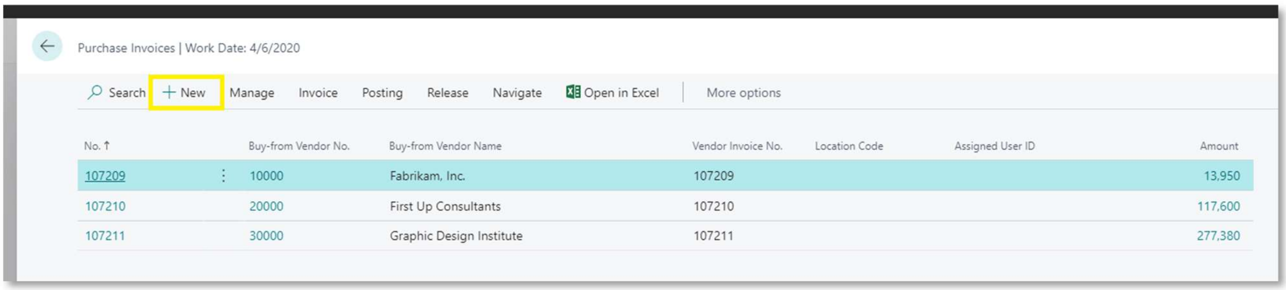
Workflow *Verkflæði samþykkisbeiðna fram yfir á tíma* is used for remainding users on pending approvas that are overdue and *ADV Verkflæði samþykktar innkaupaskjala* is used for Purhase Approvals. Before start using any of them you have to enable it (Open workflow card and click on *Enable* button).



Purchase approvals worflow card

4. SENDING NEW APPROVALS REQUEST FROM PURCHASE DOCUMENT

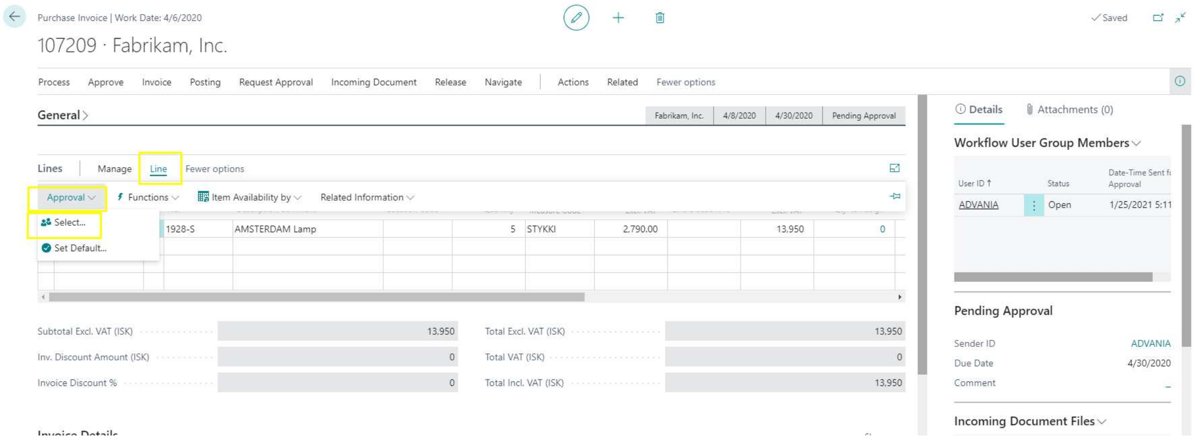
Go to *Sales Invoices* and click on *New* action.



Sales Invoices

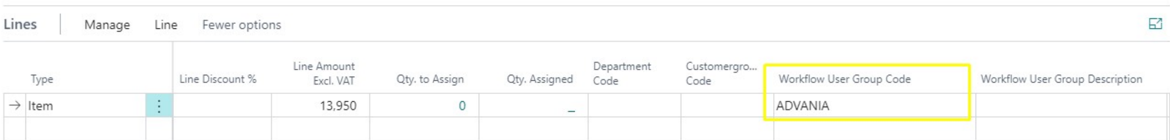
All mandatory fields on this document has to be populated (*Vendor Name*, *Vendor Invoice No*., etc.). In this example function for automatically Workflow User Group suggestion will not be used. Instead of that we will add *Workflow User Group* manually.

If you want to add the same *Workflow User Group* on many lines, select lines and click on *Select* action. After that, existing *Workflow User Group* has to be selected.



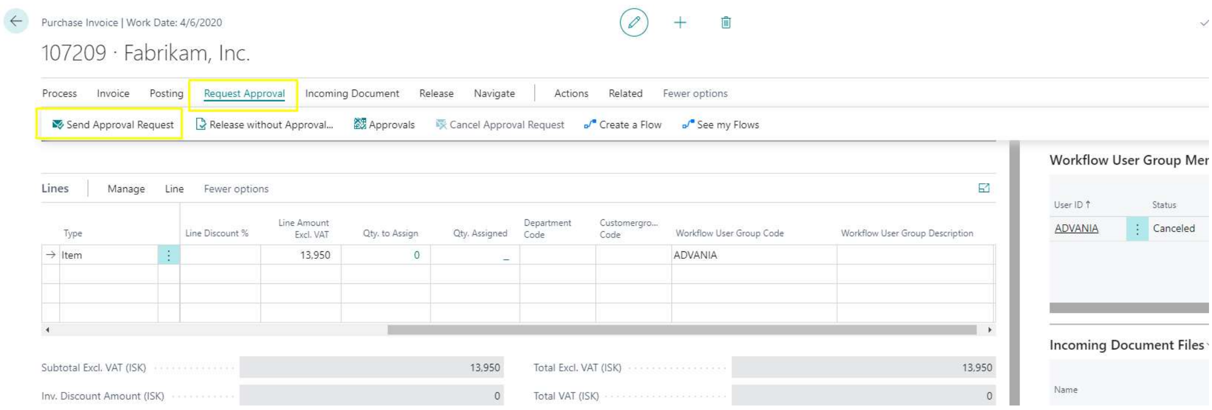
Select function (Purchase Invoice)

After that Workflow User Group Codes are populated. Of course, different *Workflow User Groups* can be used for each line in purchase document.

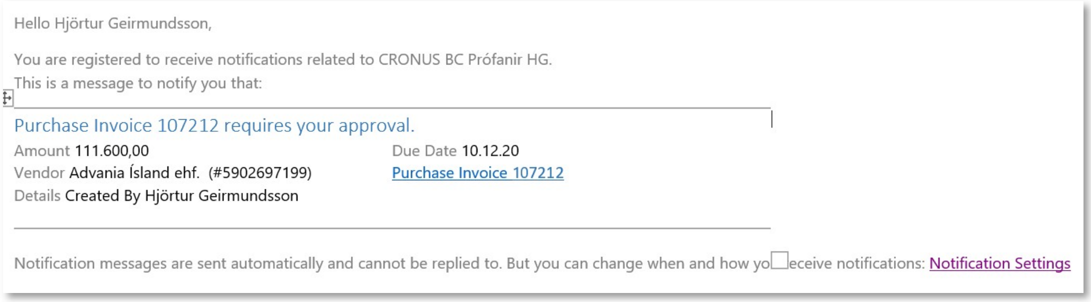


Purchase Invoice lines

After selecting *Workflow User Group Codes* we are ready to send approval request for this document. It can be done using action *Send Approval Request.* After sending request, approver are automatically notified about it (via e-mail or notes). If user is at the same time approval sender and approver e-mail will not be sent.



Sending Approval Request

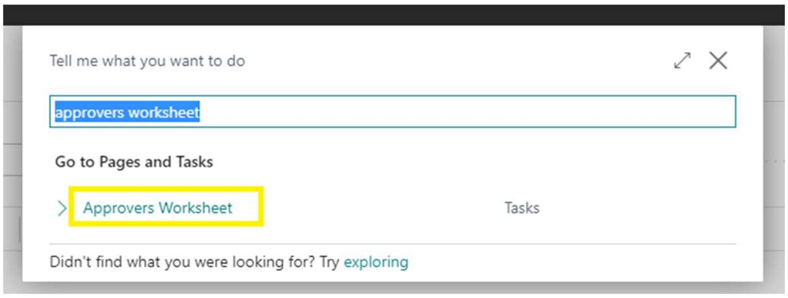


Notification e-mail (example)

5. Approvers Worksheet

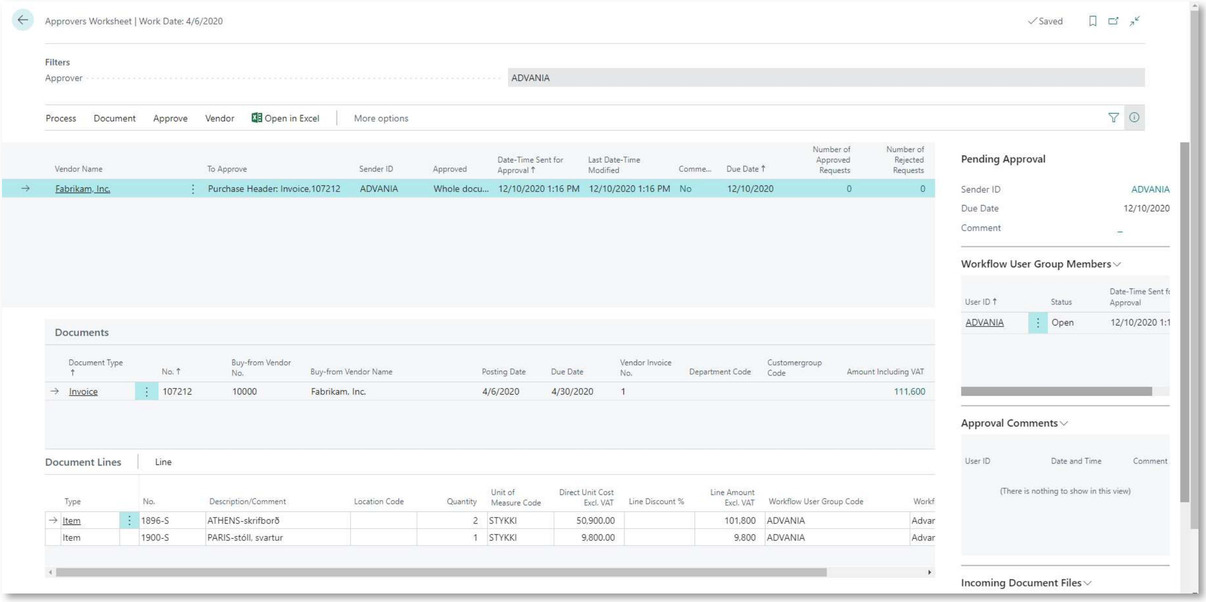
On this worksheet user has ability to see all pending request and perform some actions.

Start by typing *Approvers Worksheet* into *tell me* search bar.



„Tell me“ search bar

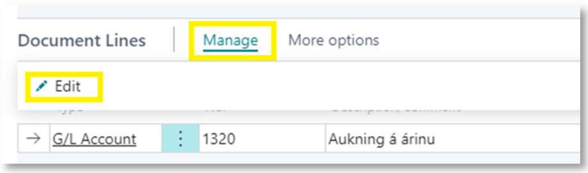
Worksheet is filtered by User(Approver) automatically. In this view we are able to see all documents that is waiting for approval.



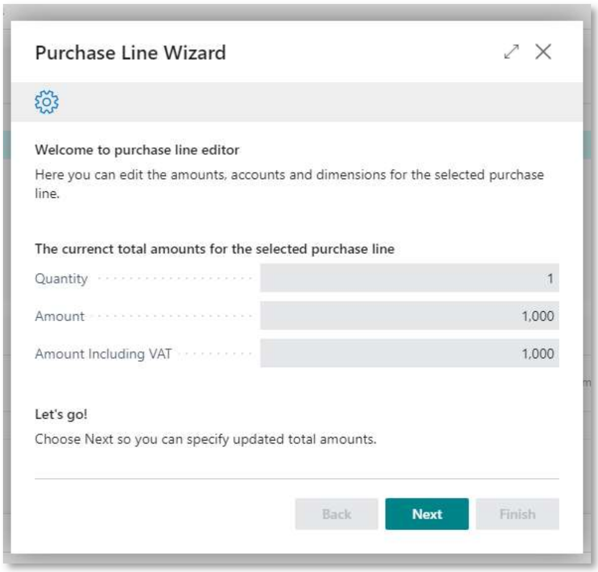
Approvers Worksheet

If *Allow Purchase Line Changes* is selected on [*Approval User Setup*]() you will be able to change information in the rows (manually or by wizard).

If you want to use wizard go to *Manage* tab (under *Document Lines* part) and clik on *Edit* action.



Edit action

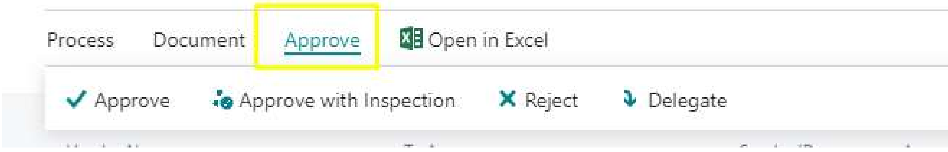


Wizard page

Note that you only can change lines with *Type* G/L Account.

Approve actions

Under *Approve* tab you can find four actions:



Approve actions

Approve is used when approver don‘t have any additional actions to do and he is fully confirmed with this request

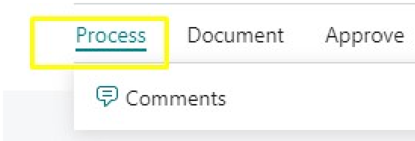
Approve with inspection is used when approvers agrees with request but he thinks that some additional actions have to be made regarding that request.

Reject is used when approver don‘t want to approve request.

Delegate is used when approver wants to delegate request to some other approver.

Before using action *Approve with inspection* comment has to be added to this request. For example if you don‘t have permission to add or change dimension on lines you will use this action with additional comment. Also, before using *Reject* action, comment has to be added.

Go to *Process* and click on *Comments* action.

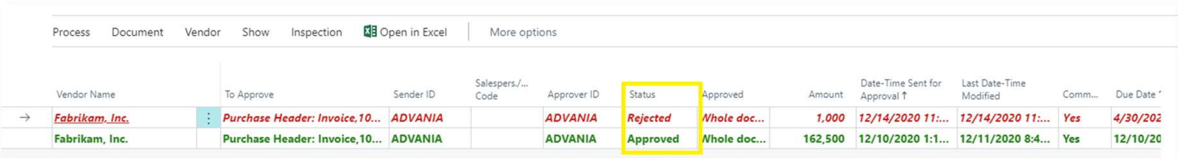


Comments action

After that you have to add comment.

Approval Comments page

Click on action *Approve with inspection.* After performing this action document is removed from *Approver Worksheet* and moved to *Posting Worksheet*. Document will also be transfered to *Posting Worksheet* after performing *Approve* or *Reject* action but with different status.

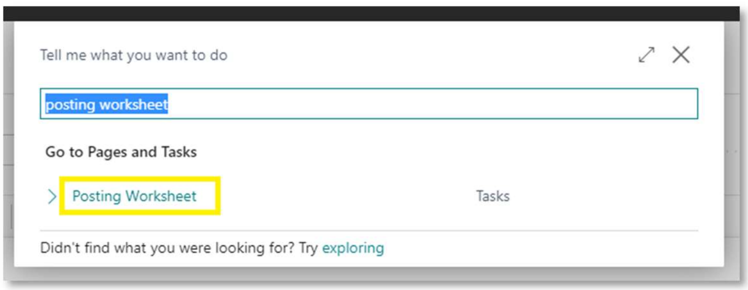


Posting Worksheet with different statuses (example)

6. Posting Worksheet

Posting Worksheet provides additional funcionalities regading approved requests. It is used by *Approver Adminitrators* to complete and post approved documents.

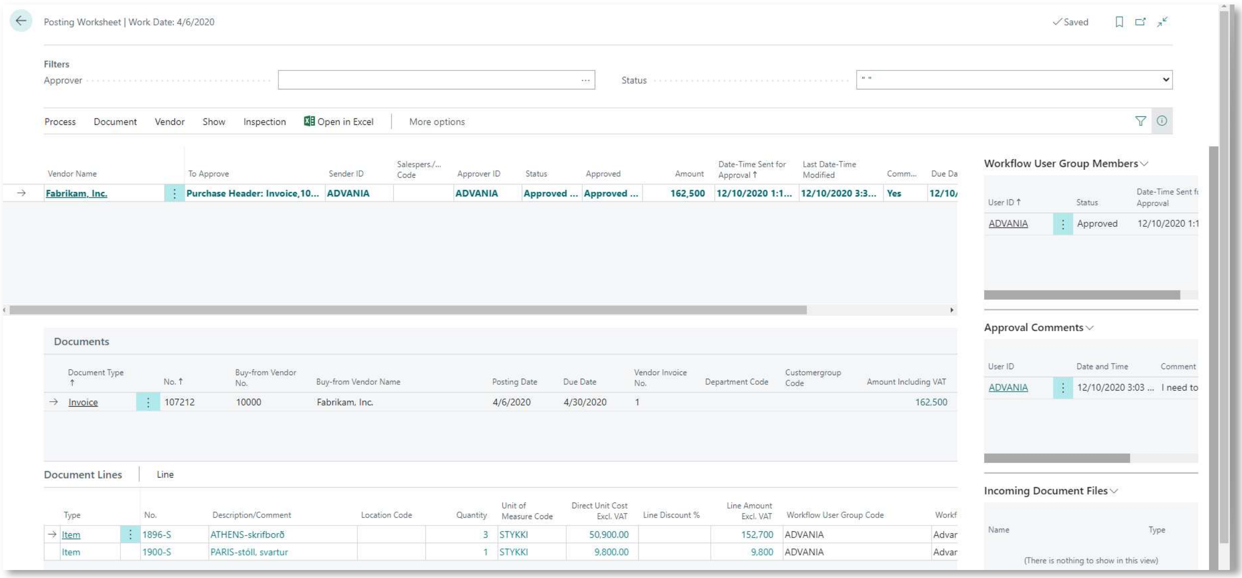
Start by typing *Posting Worksheet* into *tell me* search bar.



Tell me search bar

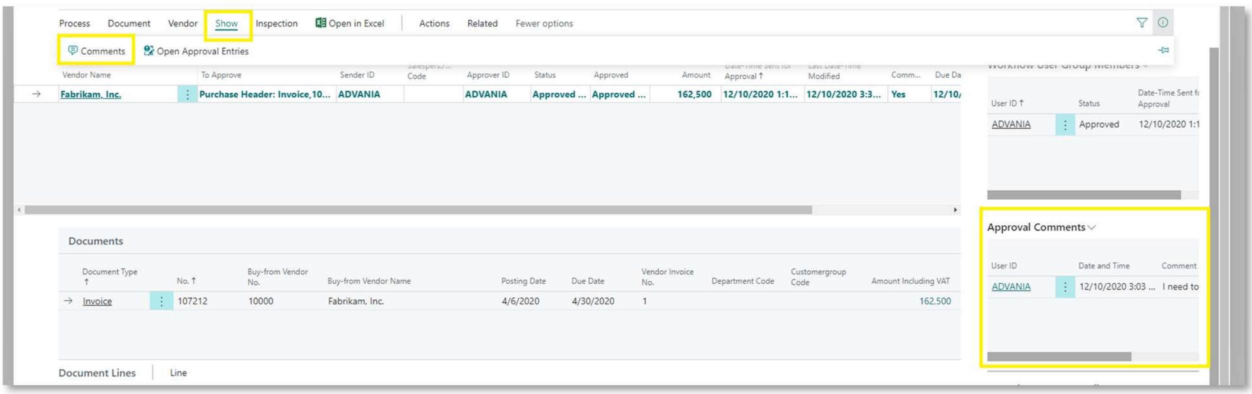
Posting Worksheet opens. At the top of the page *Approver* and *Status* filters are shown. Page can be filtered any time using this fields. For example, you may see only approved requests that comes from selected *Approver*.

In this view you may see our request that is approved using action *Approved with inspection*. All requests that are approved using this action are colored **blue**. That means that additional actions are required (user has to see attached comment). All requests that are approved using action *Approve* will be colored **green**.



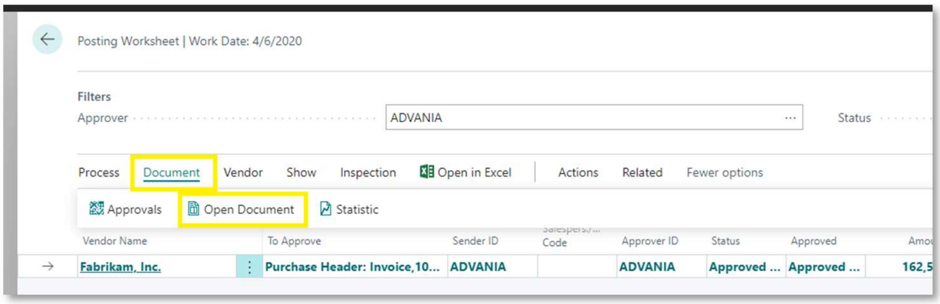
Posting Worksheet

Since the request has status *Approved with inspection Approval Administrator* has to some minor changes witch are described in attached comments. Comments can be seen using action *Comments* from *Show* tab or from *Approval Comments* factbox



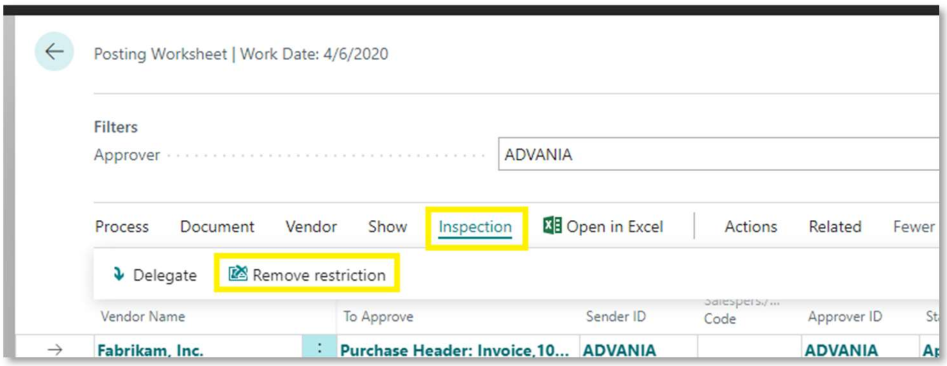
Showing Comments from Posting Worksheet

Action *Open Document* can be used to open document and perform requested actions from comments.



Open Document action

After performing changes you have to remove restriction using action with the same name.

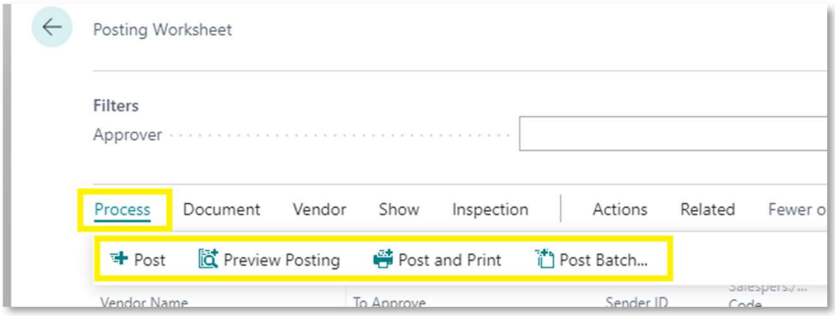


Remove restriction action

Row with selected document become green and document is ready for posting. Original approver don‘t have to approve it again.

Posting actions

Under *Process* tab you may find different posting actions. *Post*, *Preview Posting* and *Post and Print* actions are mostly standard actions. Action *Post Batch* is used for posting several documents at once. Before starting this action you have to select documents that you want to post.



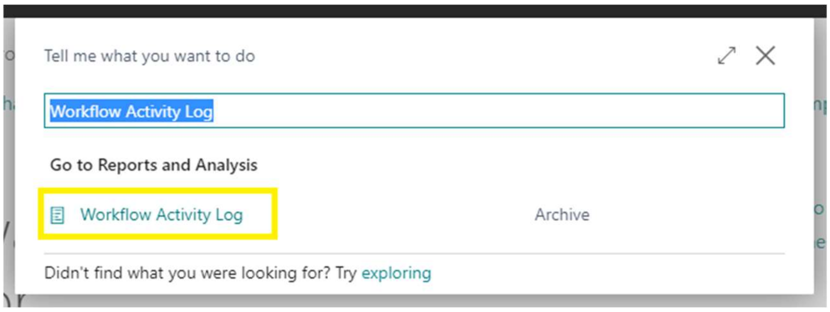
Posting actions

After sucessful posting document(s) are gone from the list.

7. Workflow Activity Log

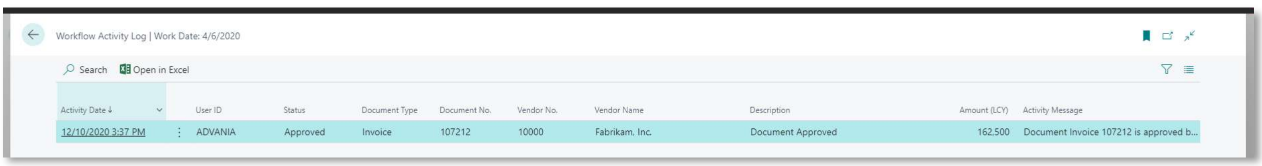
Workflow Activity Log is used to store information about approval activities.

Start by typing *Workflow Acitivity Log* into tell me search



Tell me search bar

Workflow Activity Log opens. You may see log that is connected with our previous approval activity.



Workflow Activity Log