# Hands-on-Lab 6.1: Setting up and using a purchase approval workflow

## Exercise 1: Setting up a purchase approval workflow

### Scenario

*Remark: You must make sure that at least three users exist in Business Central.*

* *User 1 = Accounting manager (take your own account for this role)*
* *User 2 = Purchase manager (take the account from one of the fellow students for this role)*
* *User 3 = Purchasing agent (take the account from one of the fellow students for this role)*

Contoso would like to start using an approval workflow for purchase orders processed by the purchasing agent. Hereby the following requirements need to be met:

* The purchase orders, placed with a vendor located in Europe and processed by the purchasing agent, cannot be approved until multiple users, setup in an hierarchy, have approved the order.
  + The purchasing agent is allowed to autonomously process orders up to $5,000.00. All purchase orders up to $10,000.00 are reviewed and approved by the purchasing manager. For all purchase orders for a higher amount the approval of the accounting manager is required.
  + The accounting manager has unlimited purchase approval and also manages the approval workflow by unblocking approval workflows.
* Other purchase orders that are processed by the always need to be approved by the accounting manager alone, regardless of the amount.
* All approvers receive an internal request note. Notes are immediately created at the moment of approval request.

### Tasks

1. Setting up approval users.
2. Setting up notifications.
3. Creating the approval workflow.

### Steps

1. Setting up approval users.
   1. On the **Approval User Setup** page, select **New**.
   2. Fill in the following fields for user 1 (accounting manager):
      1. In the **User ID** field, enter your own user ID.
      2. Leave the **Approver ID** field blank.
      3. Select the **Unlimited Purchase Approval** checkbox.
      4. Leave the **Substitute** field bank.
      5. In the **E-mail** field, enter the e-mail for the accounting manager.
      6. Select the **Approval Administrator** checkbox.
   3. On the **Approval User Setup** page, select **New**.
   4. Fill in the following fields for user 2 (purchasing manager):
      1. In the **User ID** field, enter a user ID.
      2. In the **Approver ID** field, enter the accounting manager ID.
      3. In the **Purchase Amount Approval Limit** field, enter 10,000.00.
      4. Leave the **Substitute** field bank.
      5. In the **E-mail** field, enter the e-mail for the purchasing manager.
      6. Leave the **Approval Administrator** checkbox unselected.
   5. On the **Approval User Setup** page, select **New**.
   6. Fill in the following fields for user 3 (purchasing agent):
      1. In the **User ID** field, enter a user ID.
      2. In the **Approver ID** field, enter the purchasing manager ID.
      3. In the **Purchase Amount Approval Limit** field, enter 5,000.00.
      4. Leave the **Substitute** field bank.
      5. In the **E-mail** field, enter the e-mail for the purchasing agent.
      6. Leave the **Approval Administrator** checkbox unselected.
2. Setting up notifications.
   1. From the **User Approval Setup** page, select the line for user 1.
   2. Select **Notification Setup**.
   3. On the opened **Notification Setup** page, select **New**.
      1. In the **Notification Type** field, enter **Approval.**
      2. In the **Notification Method** field, enter **Note**.
      3. Select **Notification Schedule**
         1. In the **Recurrence** field, enter **Instantly**.
         2. Close the **Notification Schedule** page.
      4. Close the **Notification Setup Page**.
   4. Repeat steps a to c for users 2 and 3.
3. Creating the approval workflow.
   1. On the **Workflow Templates** page, select **Purchase Order Approval Workflow**.
   2. Select **Actions** and then select **New Workflow from Template**.
   3. A workflow is created, in the **Code** field, the value MS-POAPW-01 is automatically filled in.
   4. On the **Worflow Steps** FastTab, select the first line where the **When Event** field contains the value ‘Approval of a purchase document is requested’
   5. Click on the **On** **Condition** field.
      1. Select the **Document Type** filter, and enter ‘Order’.
      2. Select the **Status** filter, and enter ‘Open’.
      3. Select the **Gen. Bus. Posting Group** filter,and enter ‘EU’.
      4. Click **OK** to close the **Event Conditions** page.
   6. Click on the **Then Response** field.
      1. Select response ‘Create an approval request for the record using type Approver and approver limit type Approver Chain’.
         1. On the **Options for the Selected Response** FastTab, make sure the following fields are filled in:
            1. In the **Approver Type** field, enter **Approver**.
            2. In the **Approver Limit Type** field, enter **Approver Chain**.
      2. Click **OK** to close the **Workflow Responses** page.
   7. Select the **Enabled** checkbox.
   8. Close the workflow.
   9. On the **Workflow Templates** page, select **Purchase Order Approval Workflow**.
   10. Select **Actions** and then select **New Workflow from Template**.
   11. A workflow is created, in the **Code** field, the value MS-POAPW-02 is automatically filled in.
   12. On the **Worflow Steps** FastTab, select the first line where the **When Event** field contains the value ‘Approval of a purchase document is requested’
   13. Click on the **On** **Condition** field.
       1. Select the **Document Type** filter, and enter ‘Order’.
       2. Select the **Status** filter, and enter ‘Open’.
       3. Select the **Gen. Bus. Posting Group** filter,and enter ‘<>EU’.
       4. Click **OK** to close the **Event Conditions** page.
   14. Click on the **Then Response** field.
       1. Select response ‘Create an approval request for the record using type Approver and approver limit type Approver Chain’.
          1. On the **Options for the Selected Response** FastTab, change the following fields are filled in:
             1. In the **Approver Type** field, enter **Approver**.
             2. In the **Approver Limit Type** field, enter **Specific Approver**.
             3. In the **Approver ID** field, enter your own ID, for the accounting manager.
       2. Click **OK** to close the **Workflow Responses** page.
   15. Select the **Enabled** checkbox.
   16. Close the workflow.

## Exercise 2: Using a purchase approval workflow

### Scenario

The purchasing agent places an order with vendor PURE-LOOK on January 14th, 2021, for the following items:

* 45 pieces quitkey keyboards at $50.00 a piece
* 75 pieces speakers at $38.00 a piece

### Tasks

1. Request approval of a purchase order.
2. Receiving a notification and approving the request.

### Steps

1. Request approval of a purchase order.
   1. Log in the database as the purchasing agent.
   2. On the **Purchase Orders** page, select **New**.
   3. On the opened purchase order, on the **General** FastTab, fill in the following fields.
      1. In the **Vendor No.** field, enter V9005.
      2. In the **Posting Date** and **Order Date** fields, enter 1/14/2021.
   4. On the **Lines** section, create a new line by filling in the following fields:
      1. In the **Type** field, enter Item.
      2. In the **No.** field, enter CHW1005 for the quietkey keyboards.
      3. In the **Quantity** field, enter 45.
      4. In the **Direct Unit Cost Excl. Tax** field, enter 50.00.
   5. On the **Lines** section, create a new line by filling in the following fields:
      1. In the **Type** field, enter Item.
      2. In the **No.** field, enter CHW1006 for the speakers.
      3. In the **Quantity** field, enter 75.
      4. In the **Direct Unit Cost Excl. Tax** field, enter 38.00.
   6. Select **Request Approval** and then select **Send Approval Request**.
   7. Click **OK**.
   8. In the **Status** field, the value is automatically set to **Pending Approval**.
   9. On the **Sent Notification Entries** page, a new entry is created.
2. Receiving a notification and approving the request.
   1. Log in the database as the purchasing agent.
   2. On the **Requests to Approve** page, select the line for the purchase order.
   3. Select **Approve**.
   4. On the purchase order, the **Status** field is changed to **Released**.