**ARC ID: 6637 – PO Approval with PL Hierarchy**

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For: REKO Manufacturing

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**Business Case:**

Customer was originally using the GS Certified ARC 5326 to set up a basic PO Approval Hierarchy but wanted the ability to include PO Lines and wanted to change how the emails were being sent. This project was modified to recognize a hierarchy based on price and product line and apply those rules to all required communication accordingly. An additional screen was added when the user goes to leave the PO to allow them to verify the lines and totals before submitting for approval. There was also a “Master” version of the dashboard set up to override the rules so anyone with access can approve a PO if needed.

**Project Components:**

This project consists of four custom screens, three custom menu items, three custom tables, and fires from sixteen different hooks.

The custom tables are as follows:

* GCG\_6637\_APRVL
  + This table handles the PO approval information and if the PO is awaiting approval, has been approved, or has been rejected.
* GCG\_6637\_APRVRS
  + This table handles the top-level security on if a current user has rights to approve POs for selected buyers.
* GCG\_6637\_DOL\_LMT
  + This table handles all the individual rules for which Product Line and Price rules are set to specific buyers and the approver that is authorized to approve the POs at that price level.

The custom screens/menu items are as follows:

* PO Approval Originator Maintenance
  + This screen is accessed through the menu item: Purchasing > Administration > PO Approval Hierarchy Maintenance.
  + This screen handles the maintenance of the individual Product Line and price rules that buyers require approval on and who is authorized to grant those approvals.
* PO Approval Status
  + This screen is accessed through the menu item: Purchasing > View > PO Approval Status
  + This screen allows any user to view any PO that is currently Approved, pending approval, or has been rejected.
* PO Approval Dashboard
  + This screen is accessed through the menu item: Purchasing > Transactions > PO Approval Dashboard
  + This screen allows verified approvers to review and approve or reject pending PO approvals.
* PO Approval Master
  + This screen is accessed through the menu item: Purchasing > Administration > PO Approval Master
  + This screen is an unlocked version of the PO Approval Dashboard and will display all pending PO approvals regardless of hierarchy and allow any user to approve the pending POs.

**Project Step-by-step:**

To start the process, the user will need to set up all their hierarchy rules through the PO Approval Originator Maintenance screen.

Table

Description automatically generated

Once the hierarchy is established, the system will begin to automatically approve or place POs on pending approval based on the rules set in the hierarchy. When an established buyer goes to create a PO through the manual method or through automated purchasing the system will check these hierarchy rules and approve or place the PO on pending approval accordingly. If a PO is placed on pending approval an email will be generated in courier and sent to the appropriate approver at the price range that the PO is in.

E.g.:

* If a PO is placed by BEN GRIMES with the PLs FG, RM, CM, or JM and under the price point of $10,000 the PO will be automatically approved, and no further action will need to be taken.
* If the same PO exceeds $10,000 but is below $20,000 it will be set to pending approval and an email will be sent to the email associated with the approver for BAREND.
  + The PO will then remain pending until approved or rejected by the user BAREND and a return email will be sent to the originator once the action has been taken.
* This process continues for all rules set to those product lines and price points until it reaches the top-level approver who will be the user referred to above any amount set as the highest amount.

While users are awaiting action to be taken on their POs that have been marked as pending approval, they can view their status in the PO Approval Status screen. This screen allows the user to see what has been approved, what is pending, and what has been rejected.

Table

Description automatically generated

Once the approver receives the email that they have a user requesting a PO approval they can go to the PO approval Dashboard which will be prefiltered to only POs that pertain to their level or authorization for approval.

Graphical user interface, application, table

Description automatically generated

Here the approver can take action on any available POs and generate a return email through courier announcing what action was taken on the PO to the originator.

If an authorized approver can’t get to their dashboard to approve POs, an additional screen has been provided that is an “unlocked” version of the dashboard and shows all pending POs regardless of the hierarchy assigned to them. This also removes the restriction of who can approve the PO as anyone with access to this version of the screen can approve or reject anything on the screen.

Table

Description automatically generated