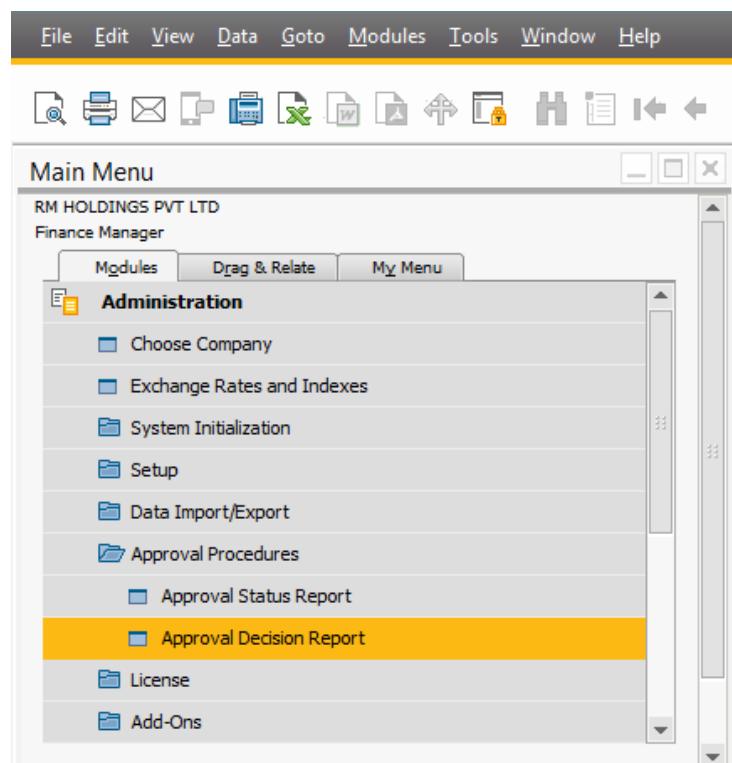


Select Approval Decision Report in Main Menu



Select following parameters in the Approval Decision Report – Selection Criteria

No Decision yet – to approve the documents

Document Production Approved – to check approved documents

Document Production Not Approved – to check not approved documents

Origination From – select approval originator (might be one or more), you could select range of users

Authorizer From – Select the user who has given the approval for the particular document (might be one or more), you could select range of users.

Template Form – not necessary

Request Date – Approval requested date, you could select range of dates

The dialog box is titled 'Approval Decision Report - Selection Criteria'. It has a 'Decision' section with three checkboxes: 'No Decision yet' (checked), 'Document Production Approved', and 'Document Production Not Approved'. Below this are four input fields with 'To' fields: 'Originator From' (Planning Executive), 'Authorizer From' (Planning Executive), 'Template From' (Planning Executive), and 'Request Date From' (Planning Executive). At the bottom are 'OK' and 'Cancel' buttons.

In the Approval Decision Report window, you can view following fields;

Document Type – this can be different types of documents related to approval criteria

Document No.

Originator

Status – might be pending or generated

Production Date – similar to posted date

Production Time – similar to posted time

Authorizer – who has given or who will give approvals to the document

Answer – approval decision

Date – approved date

Time – approved time

Remarks – you can put any comment here

Posting Date – document posting date

BP Name – Vendor or Customer name

Discount % - if it is any discount figure, you can check

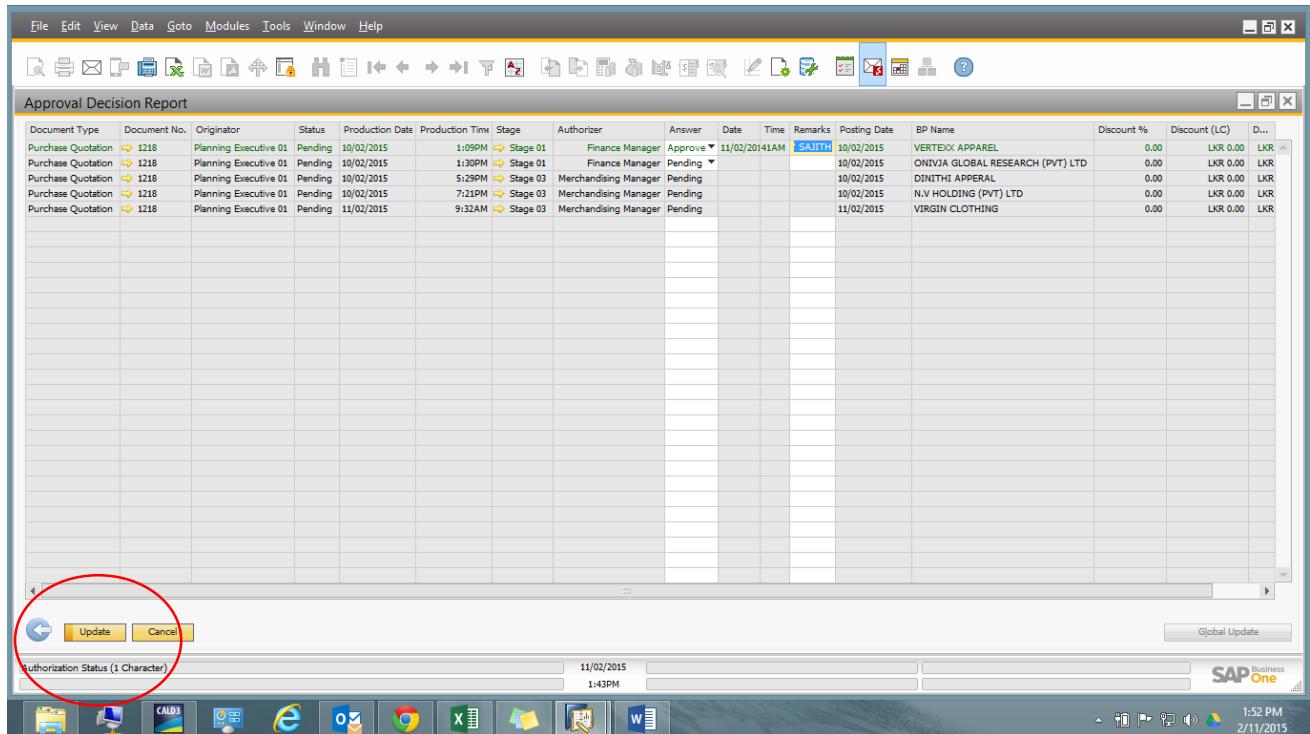
Discount (LC) – value of the discount

Doc. Total (LC) – total value of the document

Document Type	Document No.	Originator	Status	Production Date	Production Time	Stage	Authorizer	Answer	Date	Time	Remarks	Posting Date	BP Name	Discount %	Discount (LC)	...
Purchase Quotation	1218	Planning Executive 01	Pending	10/02/2015	1:09PM	Stage 01	Finance Manager	Pending	10/02/2015			VERTEXX APPAREL	0.00	LKR 0.00	LKR	
Purchase Quotation	1218	Planning Executive 01	Pending	10/02/2015	1:30PM	Stage 01	Finance Manager	Pending	10/02/2015			ONIVIA GLOBAL RESEARCH (PVT) LTD	0.00	LKR 0.00	LKR	
Purchase Quotation	1218	Planning Executive 01	Pending	10/02/2015	5:29PM	Stage 03	Merchandising Manager	Pending	10/02/2015			DINITHI APPERAL	0.00	LKR 0.00	LKR	
Purchase Quotation	1218	Planning Executive 01	Pending	10/02/2015	7:21PM	Stage 03	Merchandising Manager	Pending	10/02/2015			N.V HOLDING (PVT) LTD	0.00	LKR 0.00	LKR	
Purchase Quotation	1218	Planning Executive 01	Pending	11/02/2015	9:32AM	Stage 03	Merchandising Manager	Pending	11/02/2015			VIRGIN CLOTHING	0.00	LKR 0.00	LKR	

To generate an approval for the document;

First, you have to check the details in the documents, secondly select the answer ‘Approved’ or ‘Not Approved’ and finally, put any comment in the remarks field and click update. Thereby the approval has been forwarded to relevant user and he/she can add the document into the system.



Conclusion:

This window displays a report, based on your selections in the Approval Decision Report - Selection Criteria window, of all the draft documents that have pending approval decisions. In addition, documents can be approved directly from this report.

To display this window, choose >Administration >Approval Procedures >Approval Decision Report.

Define the selection criteria and choose the OK button.

Approval Decision Report Window

Document Type Document drafts to which the Approval Status Report applies, namely:

- Sales document drafts – Sales Quotations, Sales Orders, Deliveries, Returns, A/R Down Payments, A/R Invoices, and A/R Credit Memos.
- Purchasing document drafts – Purchase Orders, Goods Receipt POs, Goods Returns, A/P Down Payments, A/P Invoices, and A/P Credit Memos.
- Inventory document drafts – Goods Receipts, Goods Issue, and Inventory Transfers.

Document No. - Number of the document.

Originator - Name of the originator of the document.

Stage – Name of the stage as defined in the Approval Stages – Setup window.

Answer - Status of the document and authorization, namely:

- Pending – The status of a transaction awaiting approval.
- Approved – The status of a transaction that has been approved, but not yet converted from a draft to a regular document.
- Not Approved – The status of a transaction that has not been approved.

Remarks - Any remarks made by the originator that are included with the approval request. (100 Characters)

As an authorizer you can use this report to display all documents where an approval decision is required. You can:

- Approve draft documents directly within the report.
- View the current status of draft documents.
- View the name of the originator of the draft document.
- View the type of transaction requiring approval.
- View the history of an approval procedure for a draft document.

Note;

The Answer column is active only for a defined authorizer of the document and the document's status must be Pending, Approved, or Not Approved.