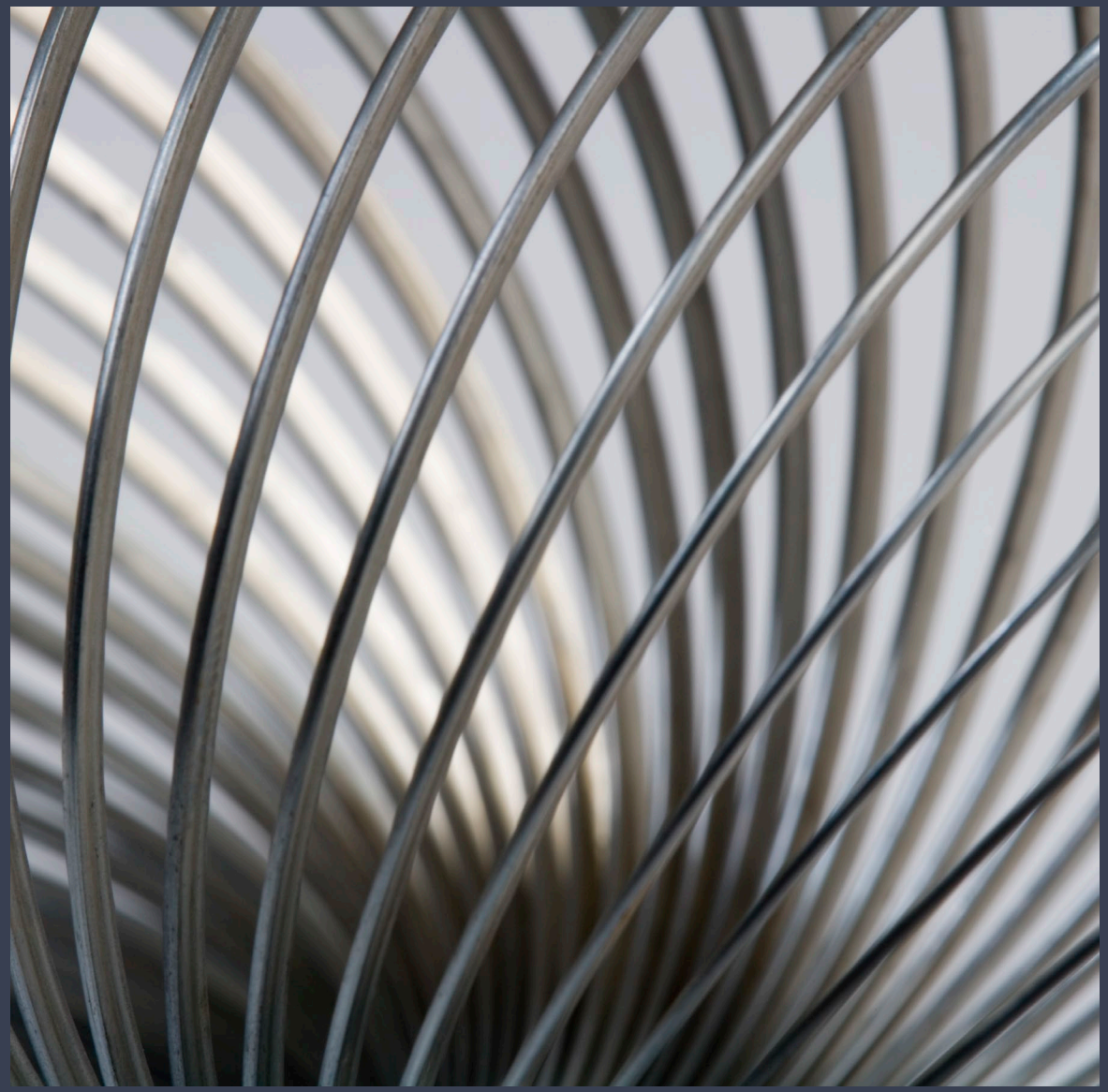
NUGM 2024

CONFIGURING A PURCHASE REQUISITION APPROVAL SYSTEM THROUGH ECAs

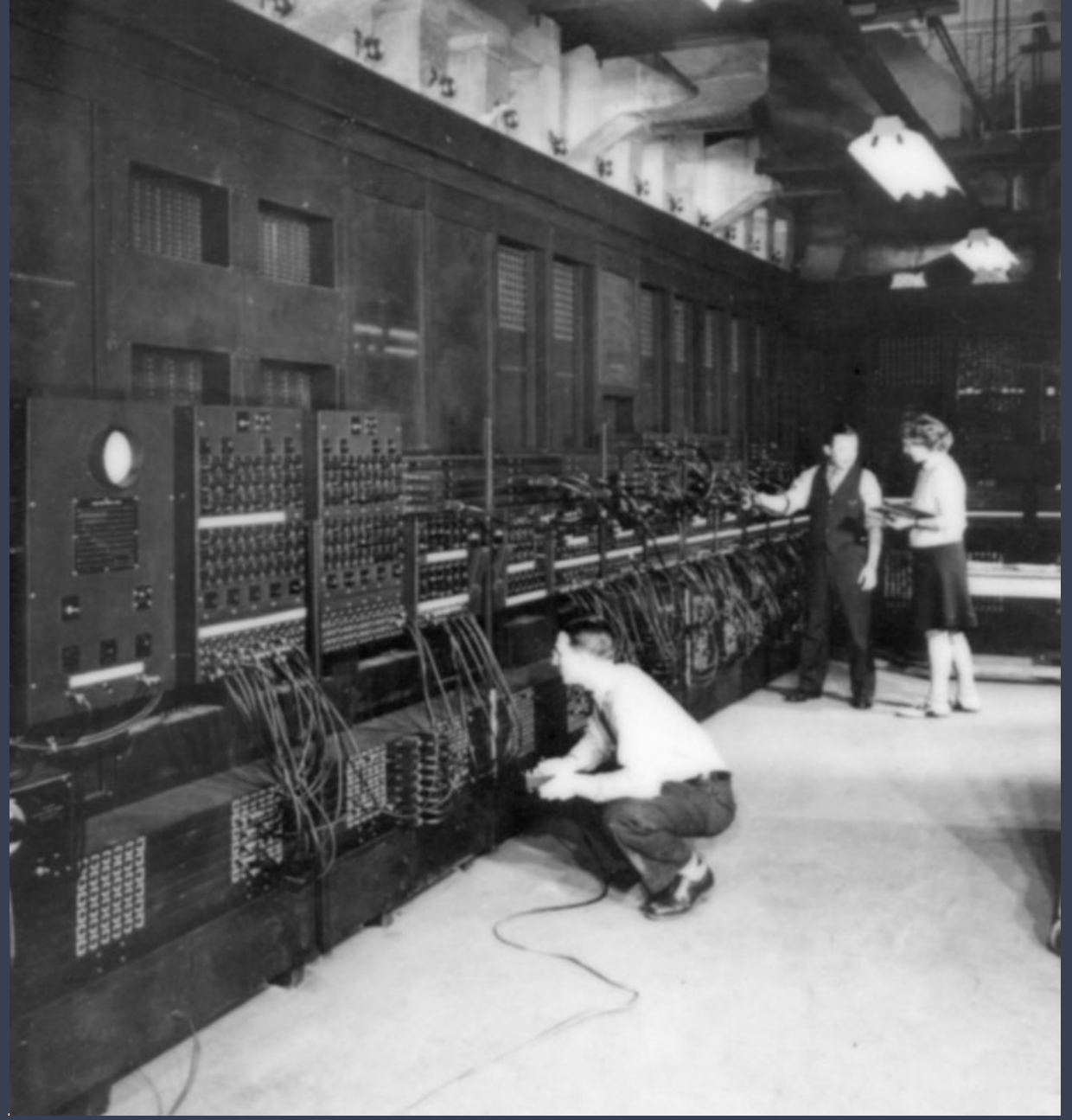
Peter Newby, Epicor



AGENDA

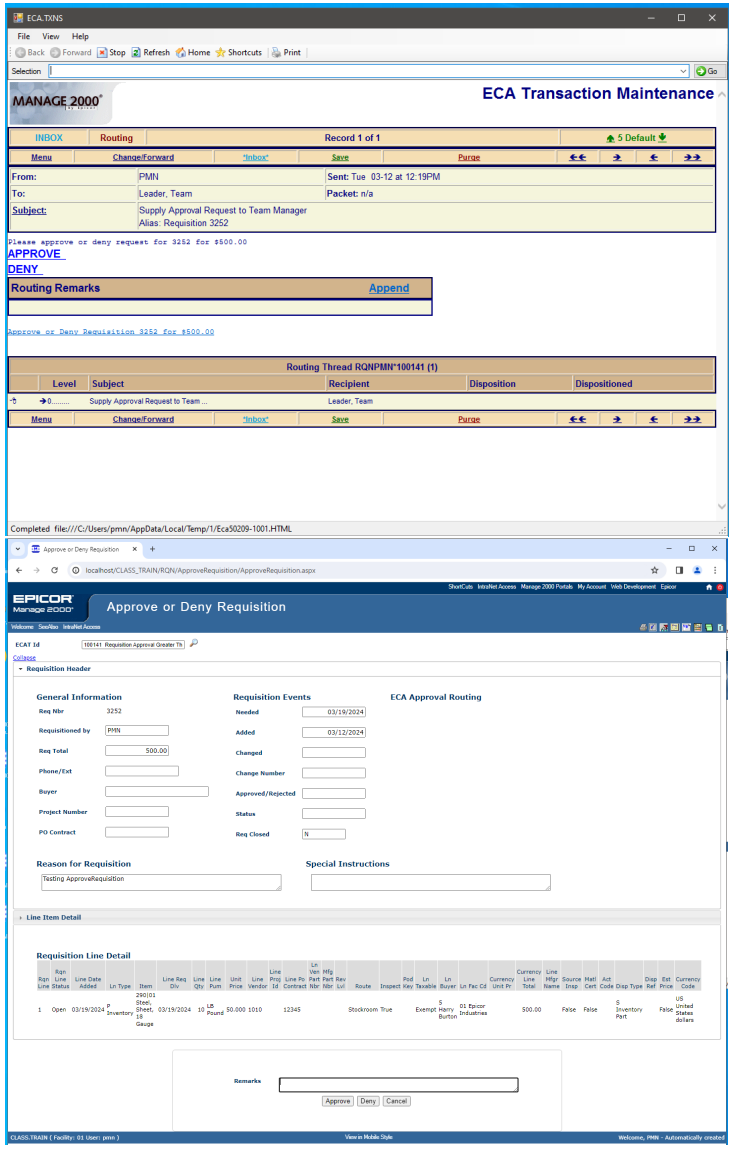
1. Purchase Requisition Approval History
2. Purchase Requisition Documentation
3. ECA Routing Basics
4. RQN.ECA.ROUTING subroutine
5. PurRequisition
6. ApproveRequisition (sp6 Trsr# 40707)
7. Multi-stage approvals demo

PURCHASE REQUISITION APPROVAL HISTORY



HISTORY

- Introduced in release 6.1
  - Before Internet Mail - MAILBOX MAIL.ROUTING.CTL
  - RQN.ENTRY - still used as entry function
  - RQN.APVL - batch approval function
  - CONVERT.RQN.TO.PO - still used to convert reqs flagged as approved
  - MRP.RQN – converts MRP generated requisition to purchase orders
- ECA Routings using ECA.TXNS Inbox to approve
- ECA Routings using ApproveRequisition web page



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PURCHASE REQUISITION DOCUMENTATION

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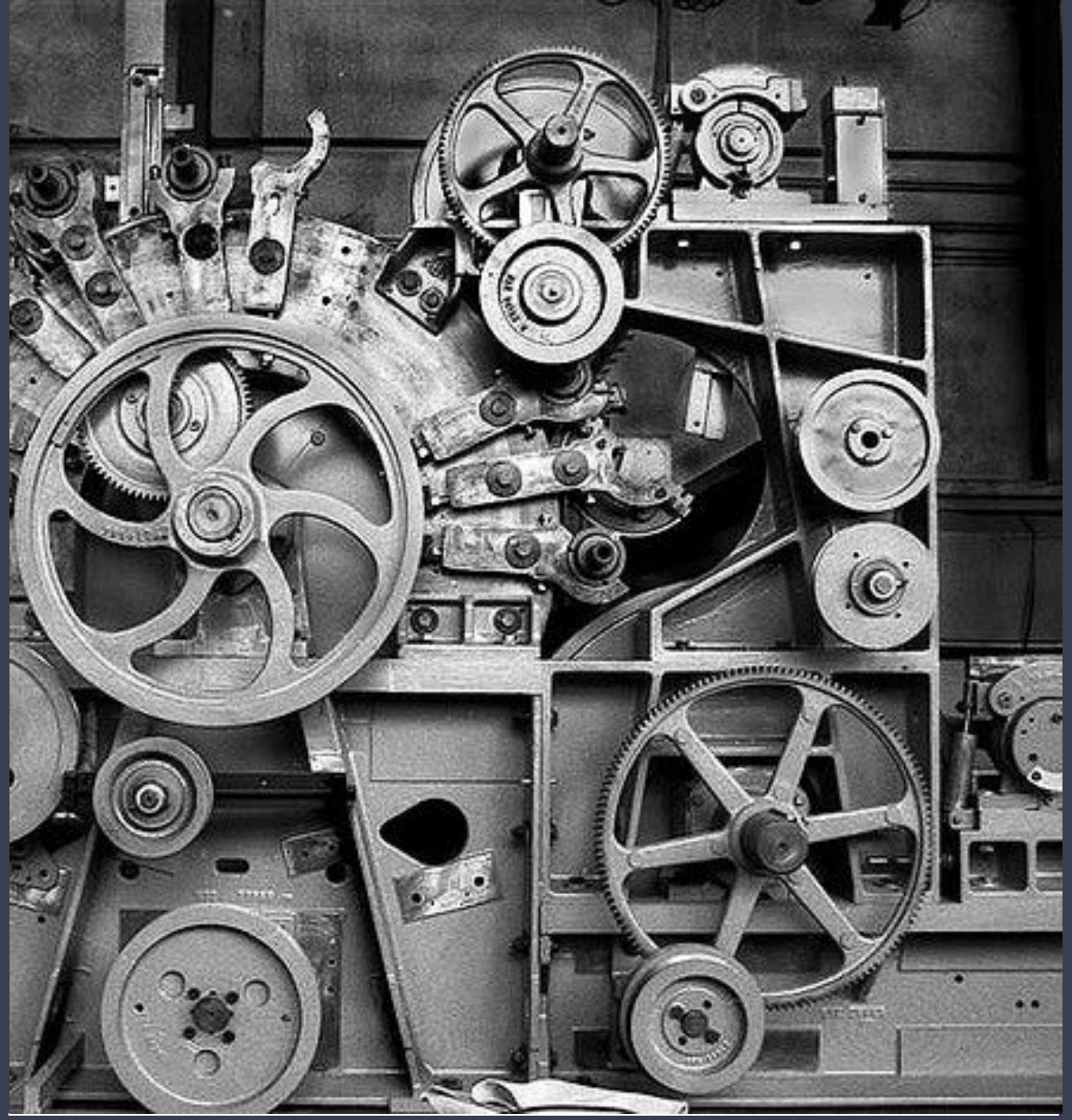
- RQN.DOC - RQN.HOWTOS
  - APPROVE.RTG.CODES
  - PROCESS.PURCHASE.REQ
- ECA.COURSE
  - Routings
    - Rewritten for sp7
    - Workshop 12.1 - 12.3

ECA ROUTINGS - BASICS



ABOUT ECA ROUTINGS

ECA Routings are comprised of many ECA.BUILD records.

They are linked together by sharing the same Routing Master Code.

SORT ECAD RTG.MASTER DESCRIPTION

ECA Code	Routing Master	Description
RTGPMN_1	RQNPMN	Requisition Approval Less Than Dollar Amt
RTGPMN_2	RQNPMN	Requisition Approval Greater Than Dollar Amt
RTGPMN_3	RQNPMN	Requisition Denied
RTGPMN_4	RQNPMN	Requisition approved by mgr, notify user & buyer
RTGPMN_5	RQNPMN	Requisition approved, notify buyer
RTGPMN_6	RQNPMN	Requisition Approved, notify Requisitioner

1 of 1

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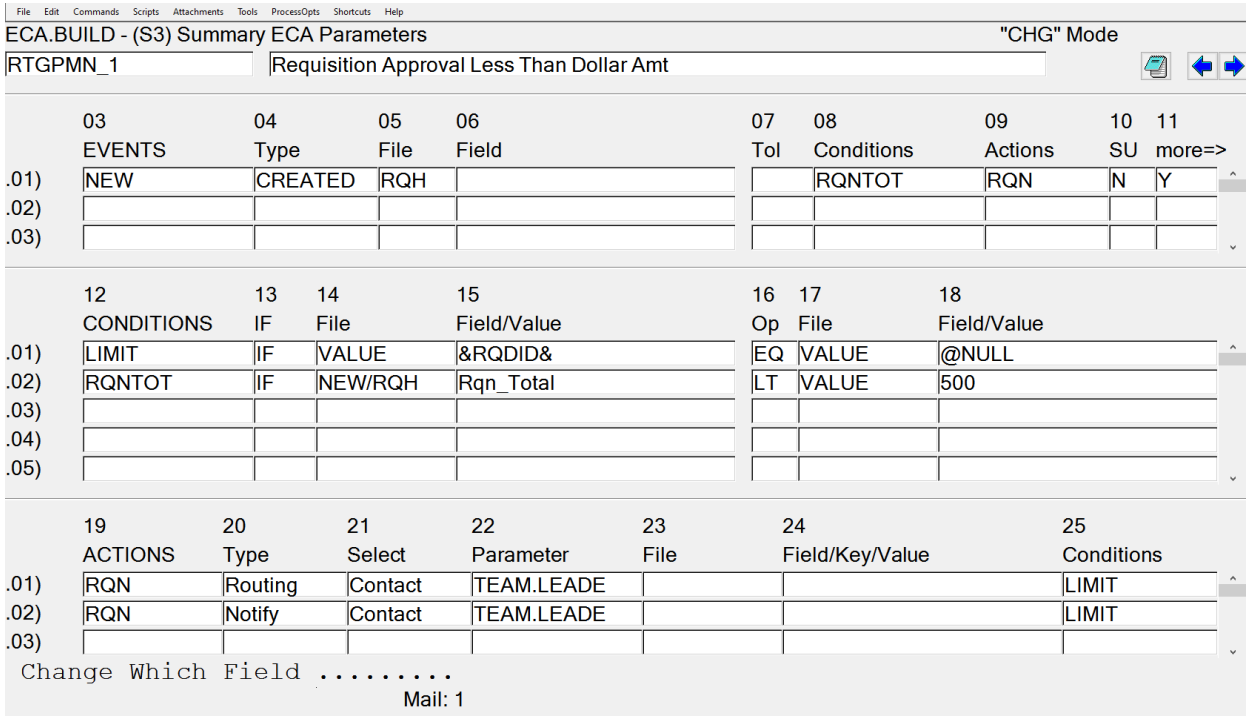
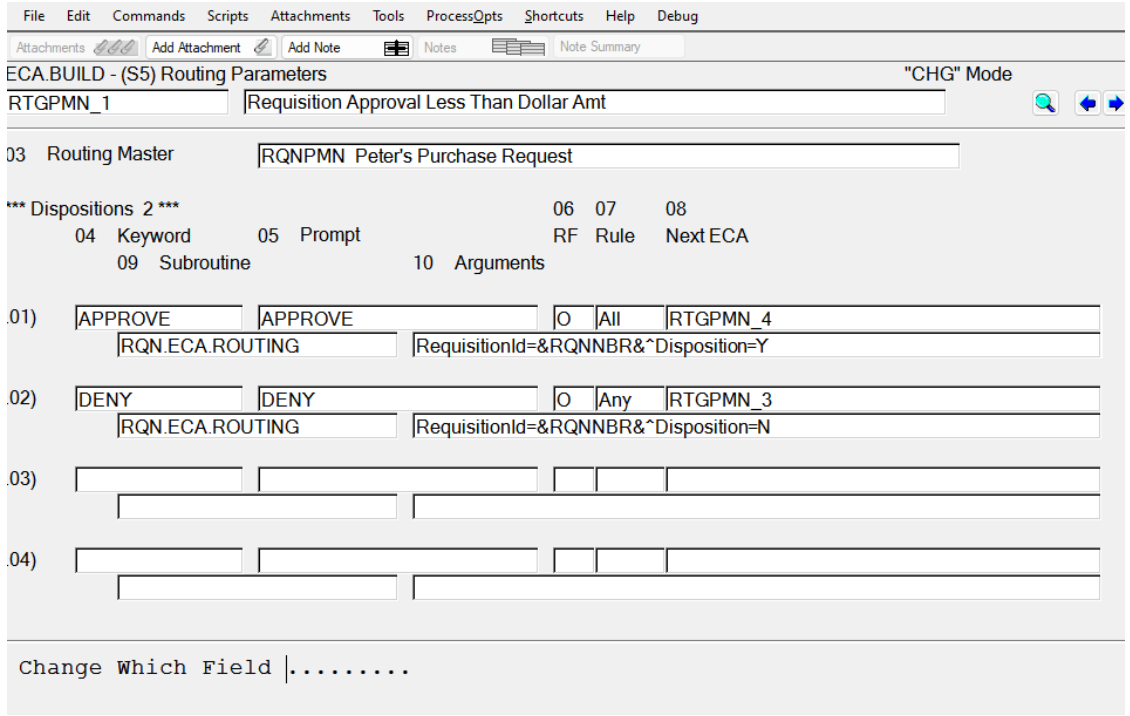
ABOUT ECA ROUTINGS

The initial notification is triggered by Manage 2000 activity, but the events that follow are triggered by users responses to previous ECAs in the chain.





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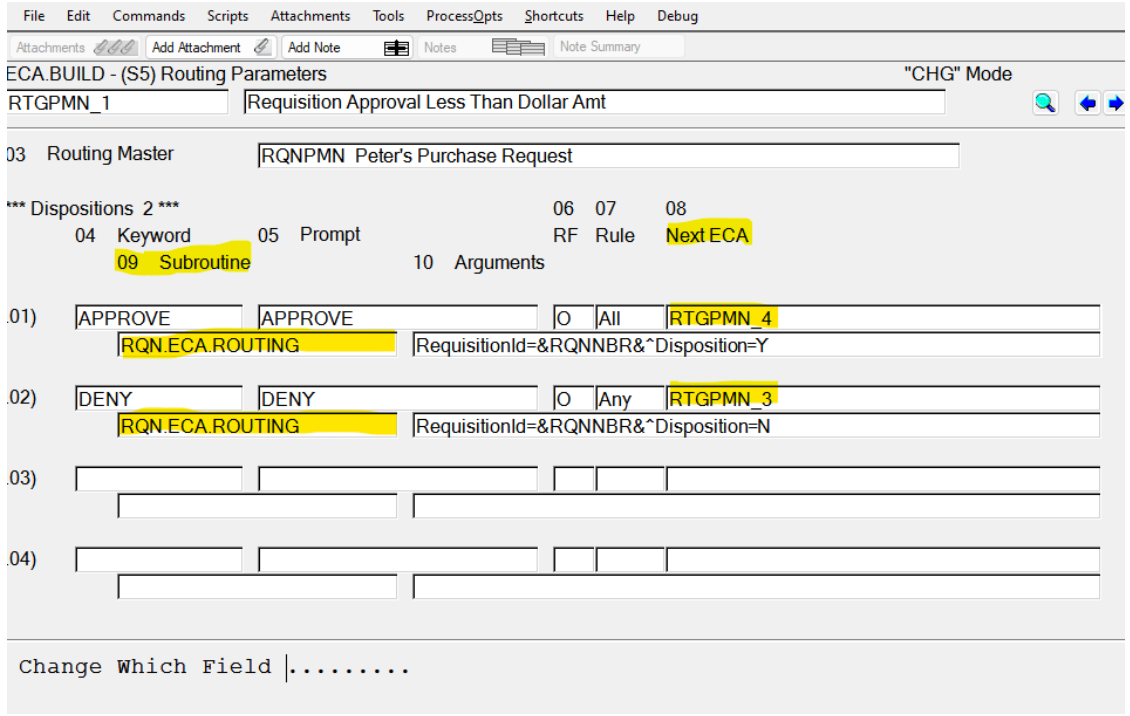
ABOUT ECA ROUTINGS

The routings option in ECA.BUILD links an ECA to an application specific plug-in subroutine and subsequent ECAs that should be triggered based on a user's approval or rejection.



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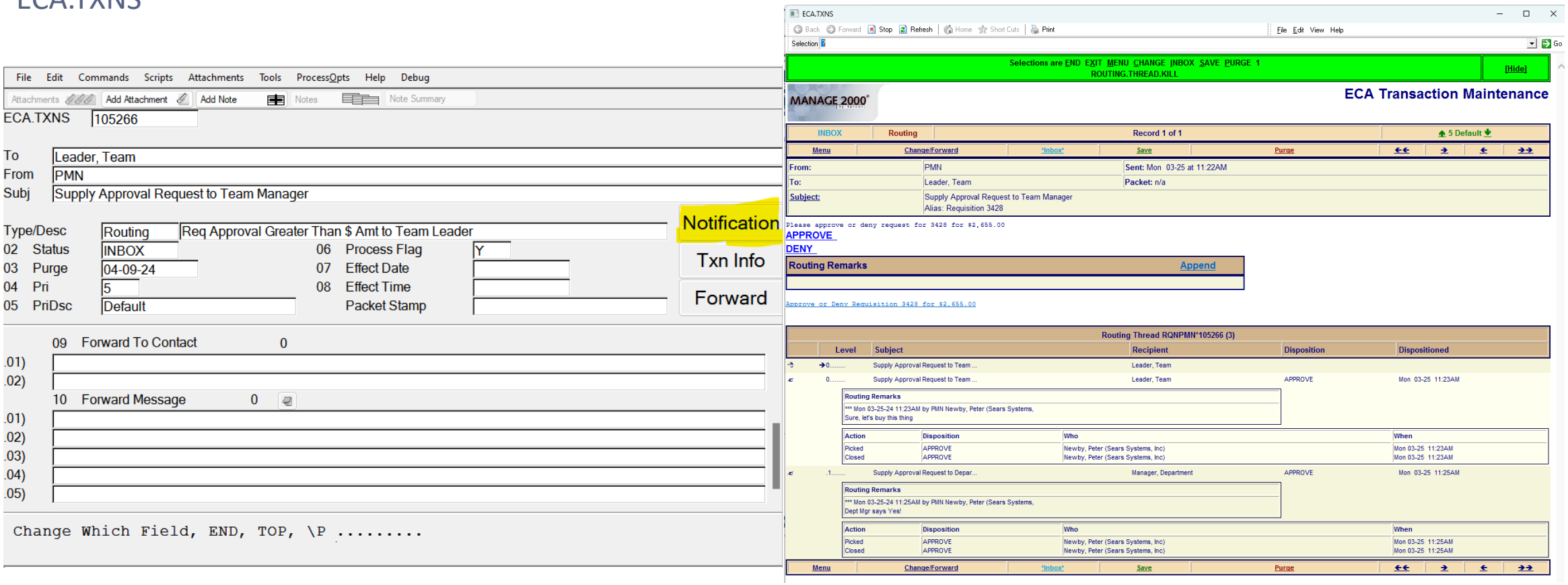
ECA.TXNS RESPONSE TO ROUTINGS

Users may respond to routing notifications in ECA.TXNS



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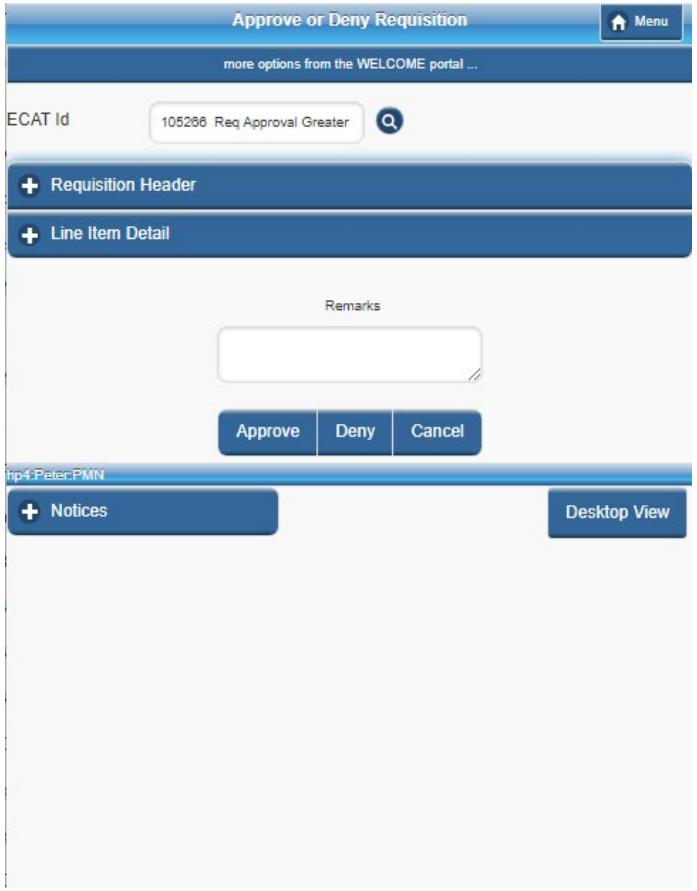
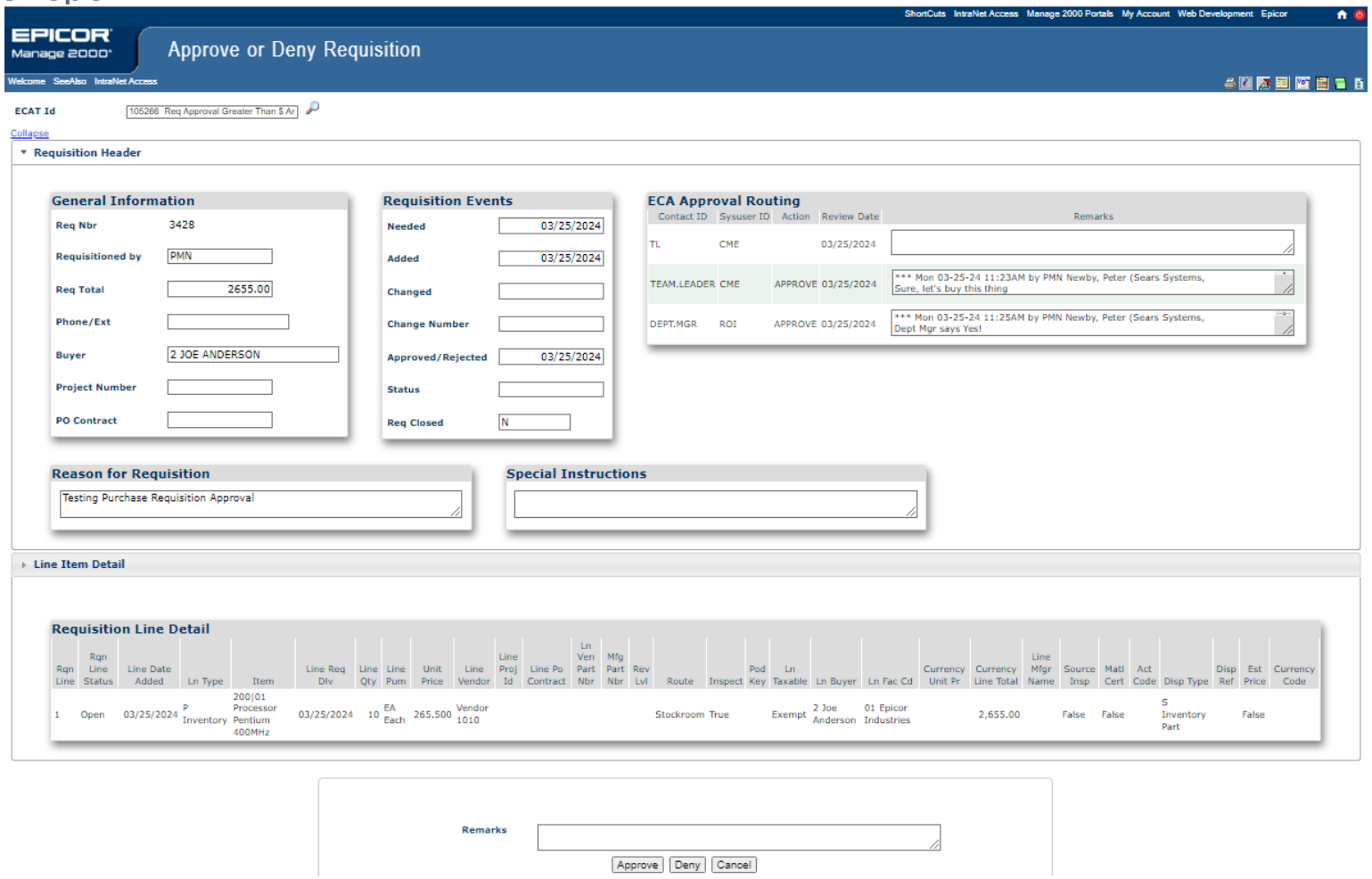
APPROVEREQUISITION

Or through more application specific functions like ApproveRequisition. Treasure # 40707 for sp6





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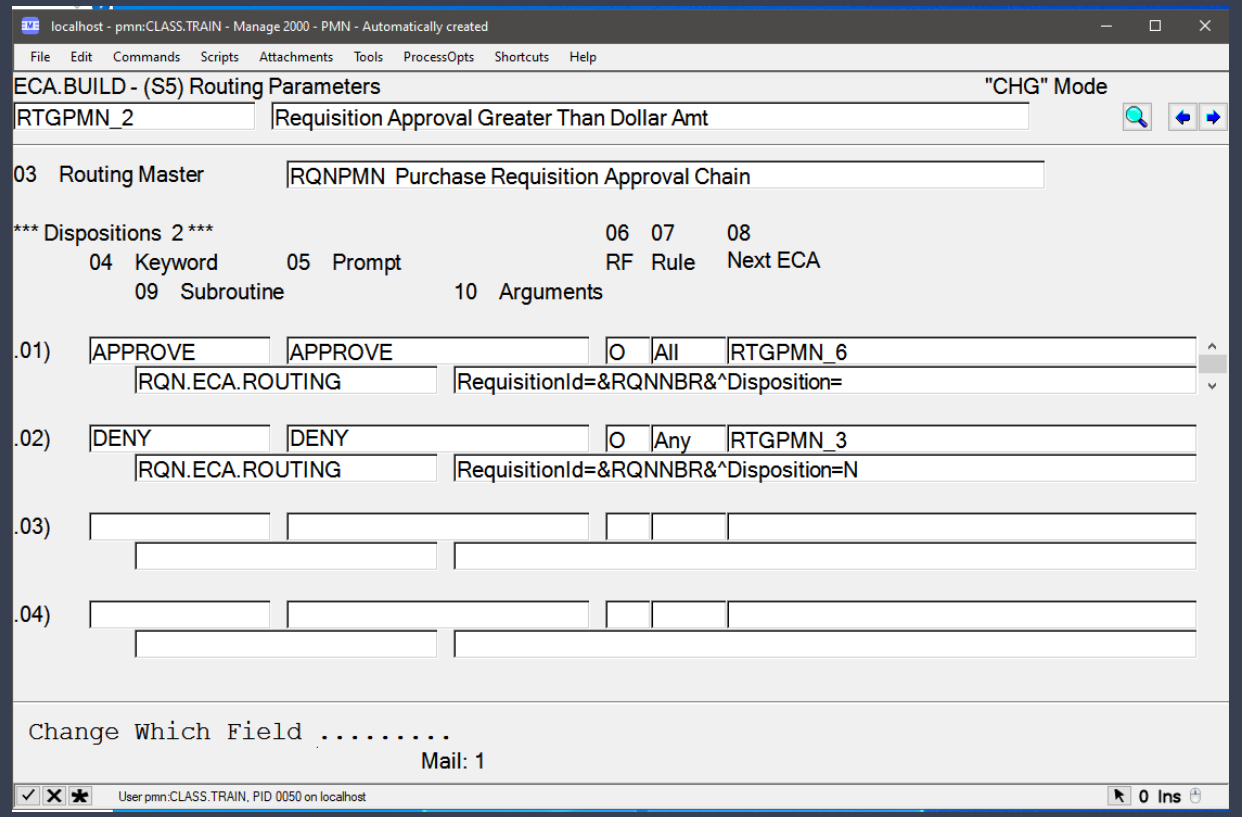
RQN.ECA.ROUTING

Purchase Requisition ECA Routing Handler



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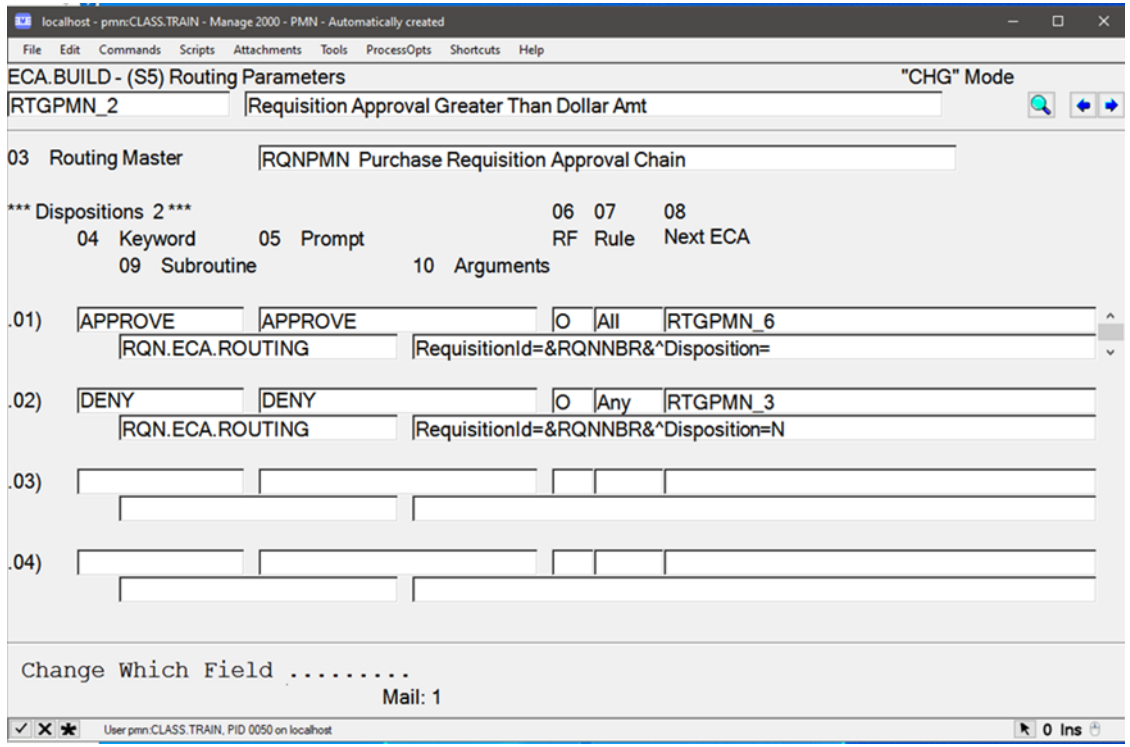
RQN.ECA.ROUTING

Whether from ECA.TXNS or ApproveRequisition, the subroutine identified in ECA.BUILD Routings screen is called with the specified arguments and any Next ECAs listed are triggered.



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ABOUT RQN.ECA.ROUTING

- RQN.ECA.ROUTING is the standard provided subroutine for approving, denying, or escalating purchase requisitions.
- RQN.ECA.ROUTING updates the RQH file Eca_Rtg_Apvls set with individual purchase requisition approval status, review dates, contact id, and remarks.
- If the final disposition is ‘Y’ then RQH Apvd is set Approved and CONVERT.RQN.TO.PO will pick up and convert the requisition on the next run.
- If the final disposition is ‘’ then the Eca_Rtg_Apvls set will be update with the approval, but RQH Apvd flag will NOT be set, allowing higher levels of approval to proceed.
- If the final disposition is ‘N’ then RQH Apvd is set to ‘N’ and the requisition will not be considered by CONVERT.RQN.TO.PO.

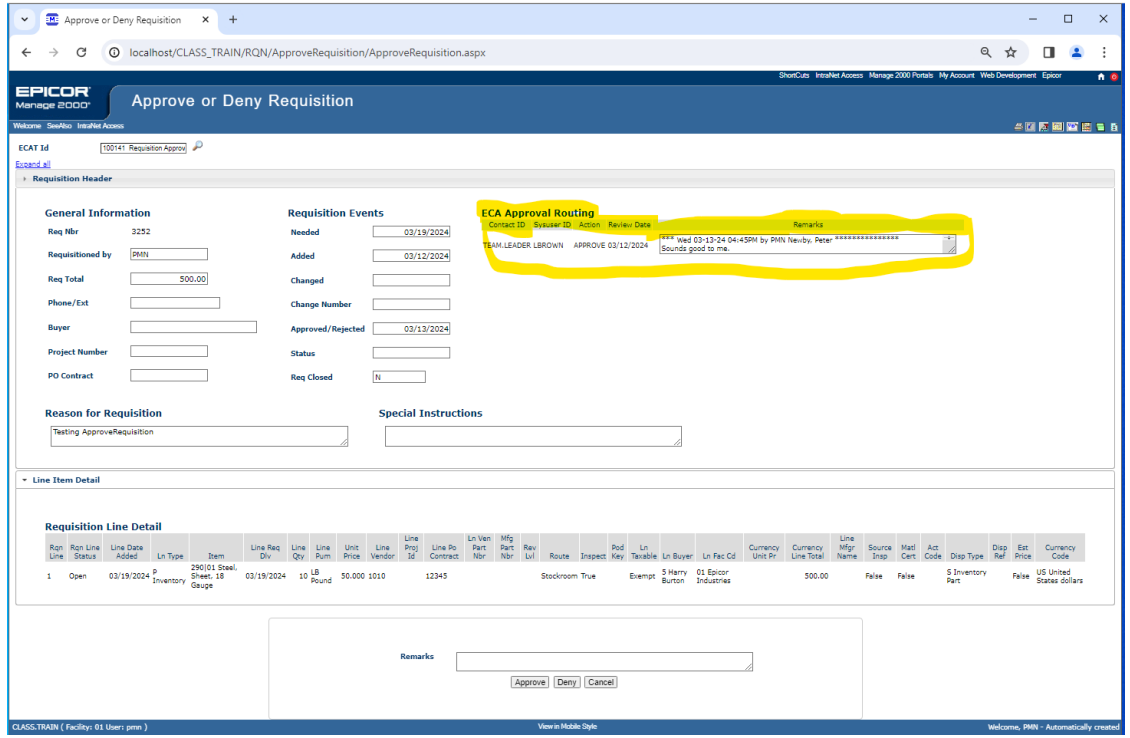
PURCHASE REQUISITION WEB FUNCTIONS

PurRequisition and

ApproveRequisition

APPROVE REQUISITION

- ApproveRequisition is a new web function which can be used to approve a requisition in place of navigating through ECA.TXNS
- It is a web page that can appear as a link in the ECA email. ECA.TXNS is a PWS function that cannot be started from an email link
- It is application oriented, not tools oriented like ECA.TXNS. The approver can see the details of the requisition they are approving.



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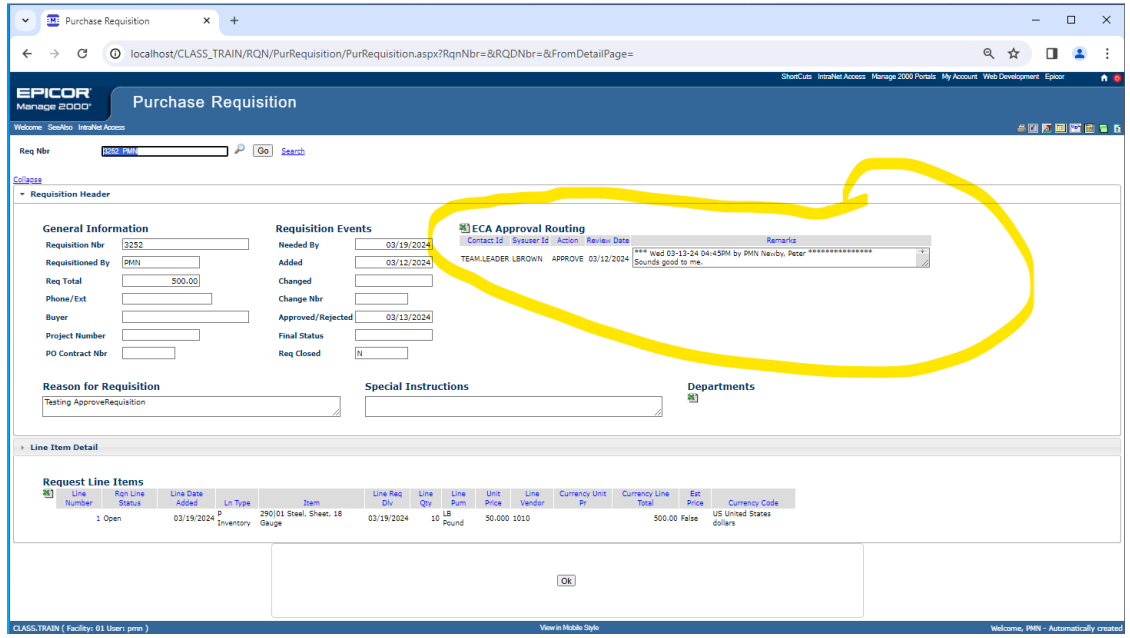
PURCHASE REQUISITION

- PurRequisition has been updated with ECA Approval Routing displays matching ApproveRequisition



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MULTI-STAGE APPROVALS DEMO

QUESTIONS AND ANSWERS

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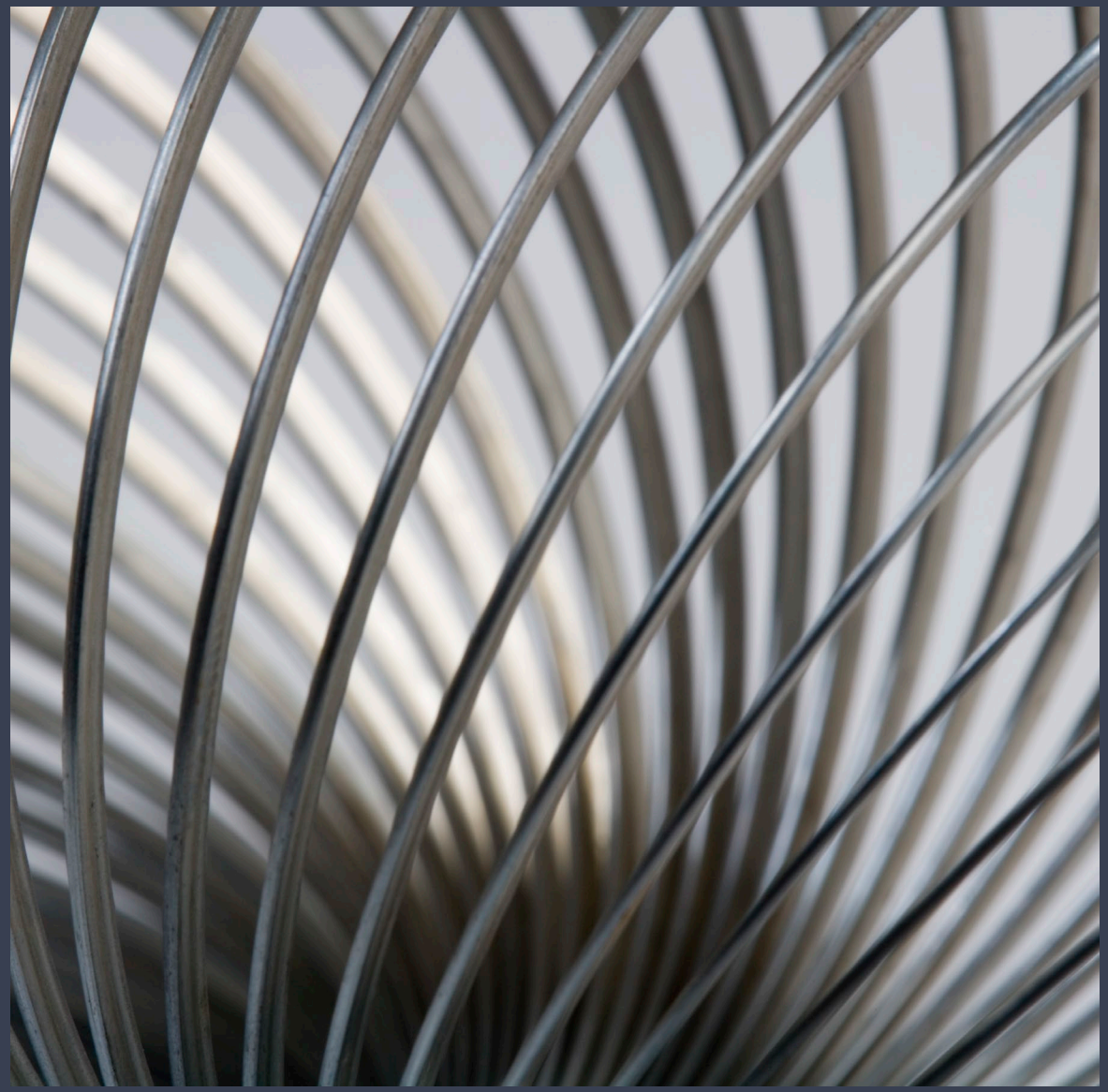
THANK YOU