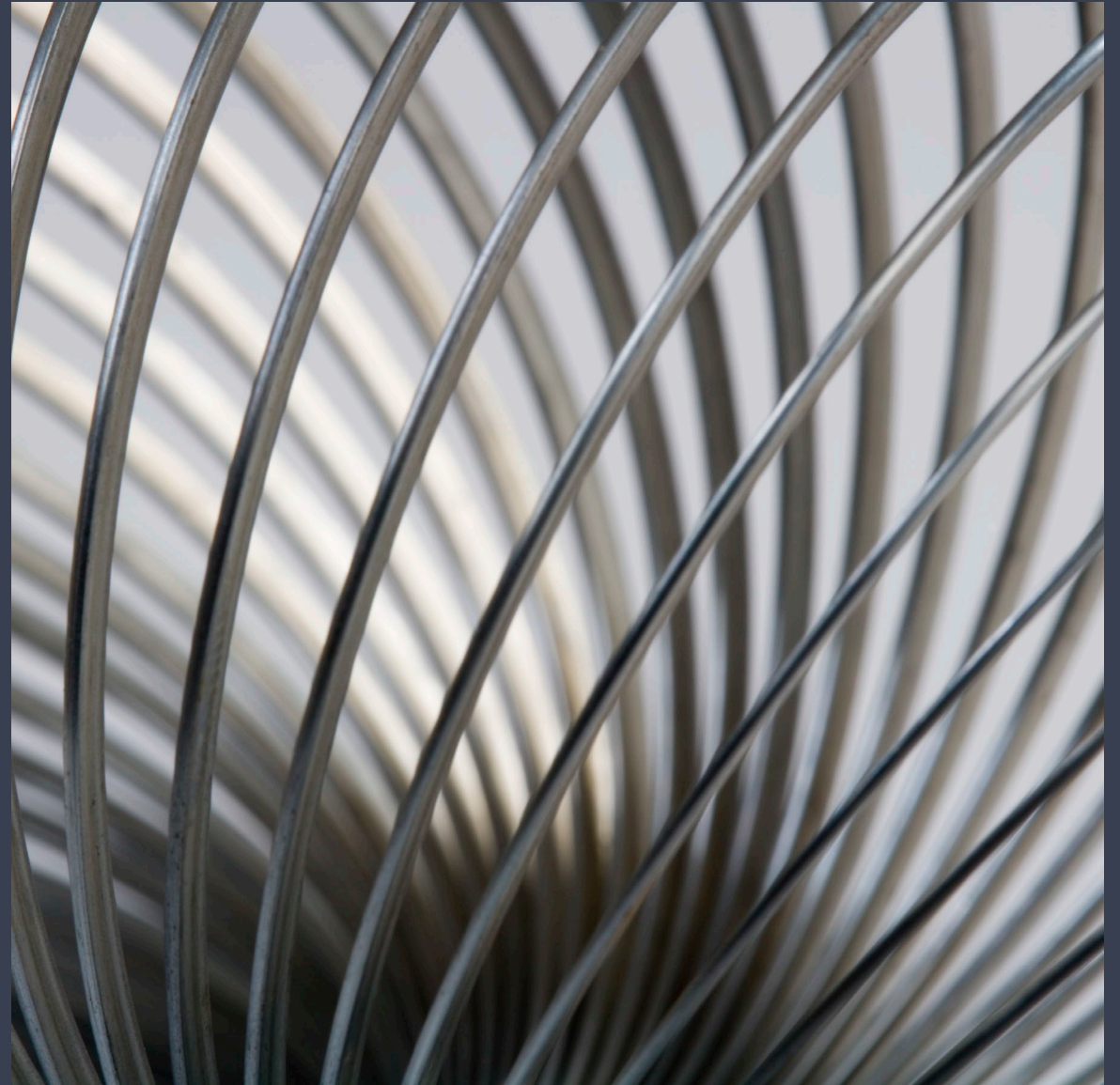


NUGM 2024

CONFIGURING  
A PURCHASE  
REQUISITION  
APPROVAL  
SYSTEM  
THROUGH ECAs

Peter Newby, Epicor



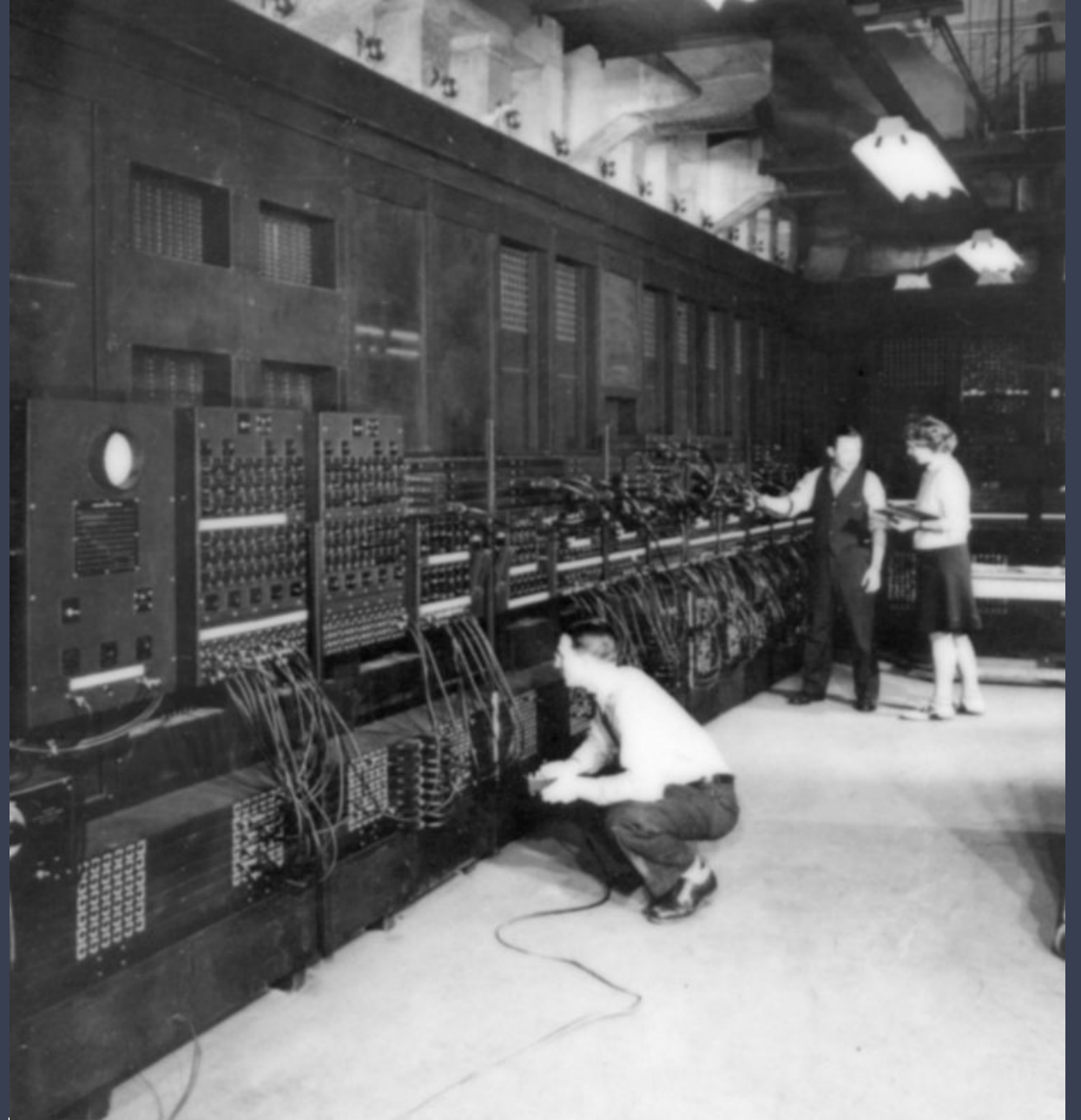
# AGENDA

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



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# 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

The image shows two screenshots of the ECA.TXNS and EPICOR systems. The top screenshot is a web browser window displaying the 'ECA Transaction Maintenance' interface. It shows an 'INBOX' with a routing record for 'Supply Approval Request to Team Manager' (Requisition 3252). The interface includes buttons for 'APPROVE' and 'DENY', and a 'Routing Remarks' section with an 'Append' button. The bottom screenshot is the 'Approve or Deny Requisition' web page in the EPICOR system. It displays a requisition header for requisition 3252, including fields for 'Req Nbr', 'Requisitioned by', 'Req Total', 'Buyer', 'Project Number', and 'PO Contract'. It also shows 'Requisition Events' and 'ECA Approval Routing' sections. The 'Reason for Requisition' field contains 'Testing ApproveRequisition'. The 'Requisition Line Detail' table shows one line item for 'Inventory Group' with a quantity of 10 and a price of \$50.00. The bottom of the page has a 'Remarks' field and 'Approve', 'Deny', and 'Cancel' buttons.



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# PURCHASE REQUISITION DOCUMENTATION

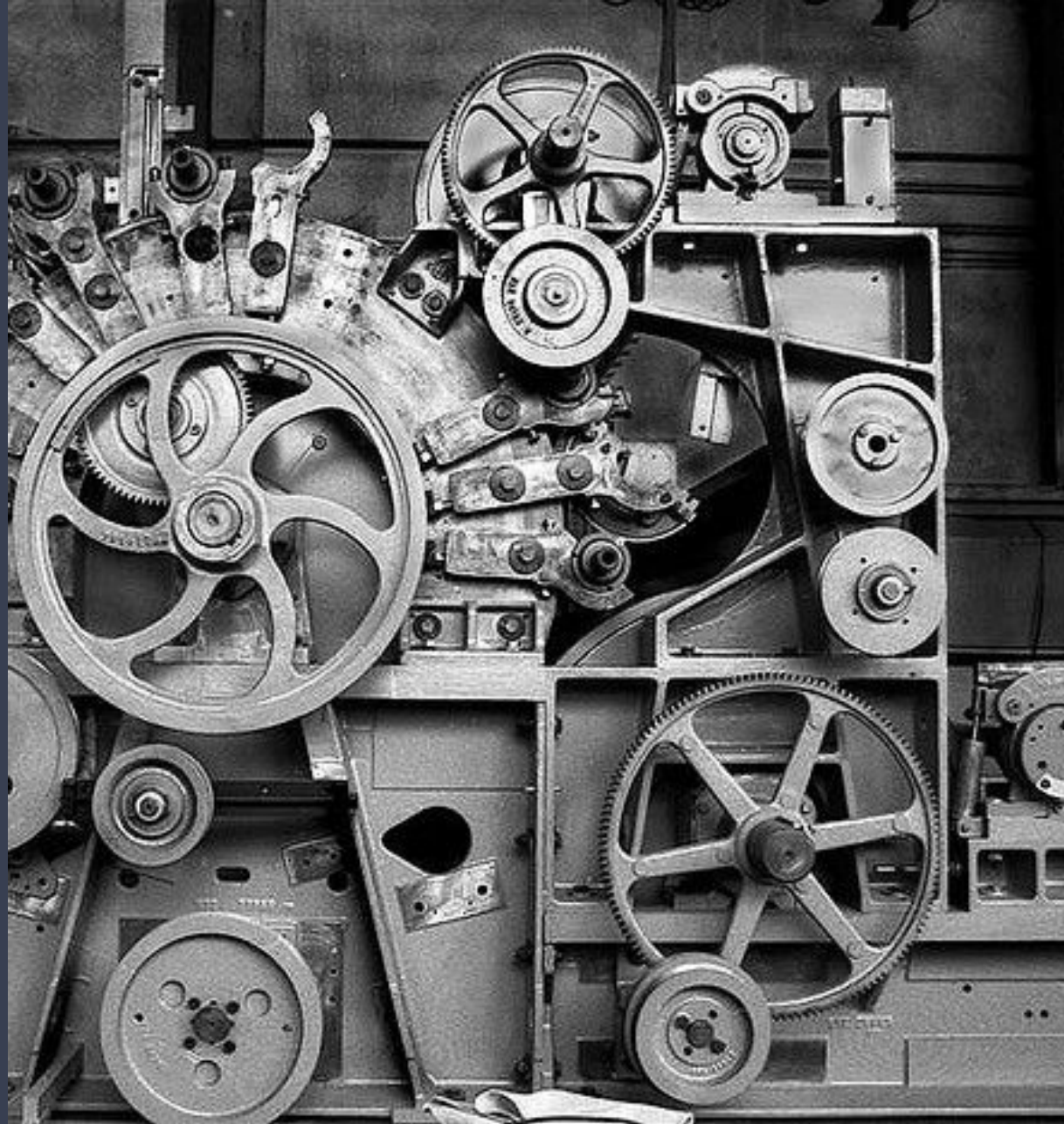


- 
- RQN.DOC - RQN.HOWTOS
    - APPROVE.RTG.CODES
    - PROCESS.PURCHASE.REQ
  - ECA.COURSE
    - Routings
      - Rewritten for sp7
      - Workshop 12.1 - 12.3



---

# 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

Refresh Available Views    SORT    <    >    Page Size    1000    Page by half   





# 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.

File Edit Commands Scripts Attachments Tools ProcessQpts Shortcuts Help

ECA.BUILD - (S3) Summary ECA Parameters "CHG" Mode

RTGPMN\_1 Requisition Approval Less Than Dollar Amt

	03	04	05	06	07	08	09	10	11
	EVENTS	Type	File	Field	Tol	Conditions	Actions	SU	more=>
.01)	NEW	CREATED	RQH			RQNTOT	RQN	N	Y
.02)									
.03)									

	12	13	14	15	16	17	18
	CONDITIONS	IF	File	Field/Value	Op	File	Field/Value
.01)	LIMIT	IF	VALUE	&RQDID&	EQ	VALUE	@NULL
.02)	RQNTOT	IF	NEW/RQH	Rqn_Total	LT	VALUE	500
.03)							
.04)							
.05)							

	19	20	21	22	23	24	25
	ACTIONS	Type	Select	Parameter	File	Field/Key/Value	Conditions
.01)	RQN	Routing	Contact	TEAM.LEADE			LIMIT
.02)	RQN	Notify	Contact	TEAM.LEADE			LIMIT
.03)							

Change Which Field .....  
Mail: 1

File Edit Commands Scripts Attachments Tools ProcessQpts Shortcuts Help Debug

ECA.BUILD - (S5) Routing Parameters "CHG" Mode

RTGPMN\_1 Requisition Approval Less Than Dollar Amt

03 Routing Master RQNPMN Peter's Purchase Request

\*\*\* Dispositions 2 \*\*\*

	04	05	06	07	08
	Keyword	Prompt	RF	Rule	Next ECA
.01)	APPROVE	APPROVE	O	All	RTGPMN_4
	RQN.ECA.ROUTING	RequisitionId=&RQNNBR&*Disposition=Y			
.02)	DENY	DENY	O	Any	RTGPMN_3
	RQN.ECA.ROUTING	RequisitionId=&RQNNBR&*Disposition=N			
.03)					
.04)					

09 Subroutine 10 Arguments

Change Which Field |.....



# 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.

The screenshot displays the 'ECA.BUILD - (S5) Routing Parameters' window in 'CHG' Mode. The window title is 'ECA.BUILD - (S5) Routing Parameters' and the mode is 'CHG' Mode. The main content area shows the following details:

- Routing Master: RQNPMN Peter's Purchase Request
- Dispositions: 2
- Fields: 04 Keyword, 05 Prompt, 06 RF, 07 Rule, 08 Next ECA, 09 Subroutine, 10 Arguments
- Routing Rule 01: APPROVE | APPROVE | O | All | RTGPMN\_4 | RQN.ECA.ROUTING | RequisitionId=&RQNNBR&\*Disposition=Y
- Routing Rule 02: DENY | DENY | O | Any | RTGPMN\_3 | RQN.ECA.ROUTING | RequisitionId=&RQNNBR&\*Disposition=N
- Routing Rule 03: (Empty)
- Routing Rule 04: (Empty)

At the bottom of the window, there is a 'Change Which Field |.....' option.



# ECA.TXNS RESPONSE TO ROUTINGS

Users may respond to routing notifications in ECA.TXNS

File Edit Commands Scripts Attachments Tools ProcessQpts Help Debug

Attachments Add Attachment Add Note Notes Note Summary

ECA.TXNS 105266

To Leader, Team

From PMN

Subj Supply Approval Request to Team Manager

Type/Desc	Routing	Req Approval Greater Than \$ Amt to Team Leader
02 Status	INBOX	06 Process Flag Y
03 Purge	04-09-24	07 Effect Date
04 Pri	5	08 Effect Time
05 PriDsc	Default	Packet Stamp

09 Forward To Contact 0

.01)

.02)

10 Forward Message 0

.01)

.02)

.03)

.04)

.05)

Change Which Field, END, TOP, \P .....

Notification

Txn Info

Forward

ECA.TXNS

Selection

Selections are END EXIT MENU CHANGE INBOX SAVE PURGE 1 ROUTING.THREAD.KILL [Hide]

MANAGE 2000<sup>®</sup> ECA Transaction Maintenance

INBOX Routing Record 1 of 1 5 Default

Menu	Change/Forward	Inbox	Save	Purge	←←	→	←	→→
------	----------------	-------	------	-------	----	---	---	----

From: PMN Sent: Mon 03-25 at 11:22AM

To: Leader, Team Packet: n/a

Subject: Supply Approval Request to Team Manager  
Alias: Requisition 3428

Please approve or deny request for 3428 for \$2,655.00

APPROVE

DENY

Routing Remarks [Append](#)

Approve or Deny Requisition 3428 for \$2,655.00

Routing Thread RQNPMN105266 (3)				
Level	Subject	Recipient	Disposition	Dispositioned
→0.....	Supply Approval Request to Team ...	Leader, Team		
← 0.....	Supply Approval Request to Team ...	Leader, Team	APPROVE	Mon 03-25 11:23AM
Routing Remarks *** Mon 03-25-24 11:23AM by PMN Newby, Peter (Sears Systems), Sure, let's buy this thing				
	Picked	APPROVE	Newby, Peter (Sears Systems, Inc)	Mon 03-25 11:23AM
	Closed	APPROVE	Newby, Peter (Sears Systems, Inc)	Mon 03-25 11:23AM
← .1.....	Supply Approval Request to Depar...	Manager, Department	APPROVE	Mon 03-25 11:25AM
Routing Remarks ** Mon 03-25-24 11:25AM by PMN Newby, Peter (Sears Systems), Dept Mgr says Yes!				
	Picked	APPROVE	Newby, Peter (Sears Systems, Inc)	Mon 03-25 11:25AM
	Closed	APPROVE	Newby, Peter (Sears Systems, Inc)	Mon 03-25 11:25AM

Menu	Change/Forward	Inbox	Save	Purge	←←	→	←	→→
------	----------------	-------	------	-------	----	---	---	----



# APPROVEREQUISITION

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

**Approve or Deny Requisition** Menu

more options from the WELCOME portal ...

ECAT Id: 105266 Req Approval Greater

**+ Requisition Header**

**+ Line Item Detail**

Remarks

mp4:Peter.PMN

**+ Notices** Desktop View

**EPICOR** Manage 2000® **Approve or Deny Requisition**

Welcome SeeAlso IntraNet Access

ShortCuts IntraNet Access Manage 2000 Portals My Account Web Development Epicor

ECAT Id: 105266 Req Approval Greater Than \$ Ar

**Requisition Header**

**General Information**

Req Nbr: 3428  
 Requisitioned by: PMN  
 Req Total: 2655.00  
 Phone/Ext:   
 Buyer: 2 JOE ANDERSON  
 Project Number:   
 PO Contract:

**Requisition Events**

Needed: 03/25/2024  
 Added: 03/25/2024  
 Changed:   
 Change Number:   
 Approved/Rejected: 03/25/2024  
 Status:   
 Req Closed: N

**ECA Approval Routing**

Contact ID	Sysuser ID	Action	Review Date	Remarks
TL	CME		03/25/2024	
TEAM.LEADER	CME	APPROVE	03/25/2024	*** Mon 03-25-24 11:23AM by PMN Newby, Peter (Sears Systems, Sure, let's buy this thing
DEPT.MGR	ROI	APPROVE	03/25/2024	*** Mon 03-25-24 11:25AM by PMN Newby, Peter (Sears Systems, Dept Mgr says Yes!

**Reason for Requisition**

**Special Instructions**

**Line Item Detail**

**Requisition Line Detail**

Rqn Line	Rqn Line Status	Line Date Added	Ln Type	Item	Line Req Div	Line Qty	Line Pum	Unit Price	Line Vendor	Line Proj Id	Line Po Contract	Ln Ven Part Nbr	Mfg Part Nbr	Rev Lvl	Route	Inspect	Pod Key	Ln Taxable	Ln Buyer	Ln Fac Cd	Currency Unit Pr	Currency Line Total	Line Mfg Name	Source Insp	Matl Cert	Act Code	Disp Type	Disp Ref	Est Price	Currency Code
1	Open	03/25/2024	P Inventory	200J01 Processor Pentium 400MHz	03/25/2024	10	EA Each	265.500	Vendor 1010						Stockroom True		Exempt	2 Joe Anderson	01 Epicor Industries		2,655.00		False	False	S	Inventory Part		False		

Remarks



# RQN.ECA.ROUTING

Purchase Requisition ECA Routing  
Handler

The screenshot shows a web browser window with the following content:

- Browser title: localhost - pmn:CLASS.TRAIN - Manage 2000 - PMN - Automatically created
- Menu bar: File Edit Commands Scripts Attachments Tools ProcessOpts Shortcuts Help
- Page title: ECA.BUILD - (S5) Routing Parameters "CHG" Mode
- Form fields: RTGPMN\_2, Requisition Approval Greater Than Dollar Amt
- Section: 03 Routing Master RQNPMN Purchase Requisition Approval Chain
- Section: \*\*\* Dispositions 2 \*\*\*
- Table headers: 04 Keyword, 05 Prompt, 06 RF, 07 Rule, 08 Next ECA, 09 Subroutine, 10 Arguments
- Row 01: APPROVE, APPROVE, [O] All, RTGPMN\_6, RQN.ECA.ROUTING, RequisitionId=&RQNNBR&^Disposition=
- Row 02: DENY, DENY, [O] Any, RTGPMN\_3, RQN.ECA.ROUTING, RequisitionId=&RQNNBR&^Disposition=N
- Row 03: (Empty fields)
- Row 04: (Empty fields)
- Footer: Change Which Field ..... Mail: 1
- System bar: User pmn.CLASS.TRAIN, PID 0050 on localhost 0 Ins



# 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.

localhost - pmn:CLASS.TRAIN - Manage 2000 - PMN - Automatically created

File Edit Commands Scripts Attachments Tools ProcessOpts Shortcuts Help

ECA.BUILD - (S5) Routing Parameters "CHG" Mode

RTGPMN\_2 Requisition Approval Greater Than Dollar Amt

03 Routing Master RQNPMN Purchase Requisition Approval Chain

\*\*\* Dispositions 2 \*\*\*

04	Keyword	05	Prompt	06	RF	07	Rule	08	Next ECA
09	Subroutine	10	Arguments						
.01)	APPROVE	APPROVE	O All	RTGPMN_6					
	RQN.ECA.ROUTING								RequisitionId=&RQNNBR&^Disposition=
.02)	DENY	DENY	O Any	RTGPMN_3					
	RQN.ECA.ROUTING								RequisitionId=&RQNNBR&^Disposition=N
.03)									
.04)									

Change Which Field .....

Mail: 1

User pmn:CLASS.TRAIN, PID 0050 on localhost 0 Ins



# 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.



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# PURCHASE REQUISITION WEB FUNCTIONS

PurRequisition and  
ApproveRequisition





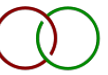
# APPROVE REQUISITION

- 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.

The screenshot displays the 'Approve or Deny Requisition' interface in EPICOR Manage 2000. The page is titled 'Approve or Deny Requisition' and shows details for requisition number 3252. The 'ECA Approval Routing' section is highlighted in yellow, showing a routing step for 'TEAM LEADER LBROWN' with an 'APPROVE' action on '03/12/2024' and a remark 'Sounds good to me.' The 'Requisition Line Detail' table below shows one line item with the following details:

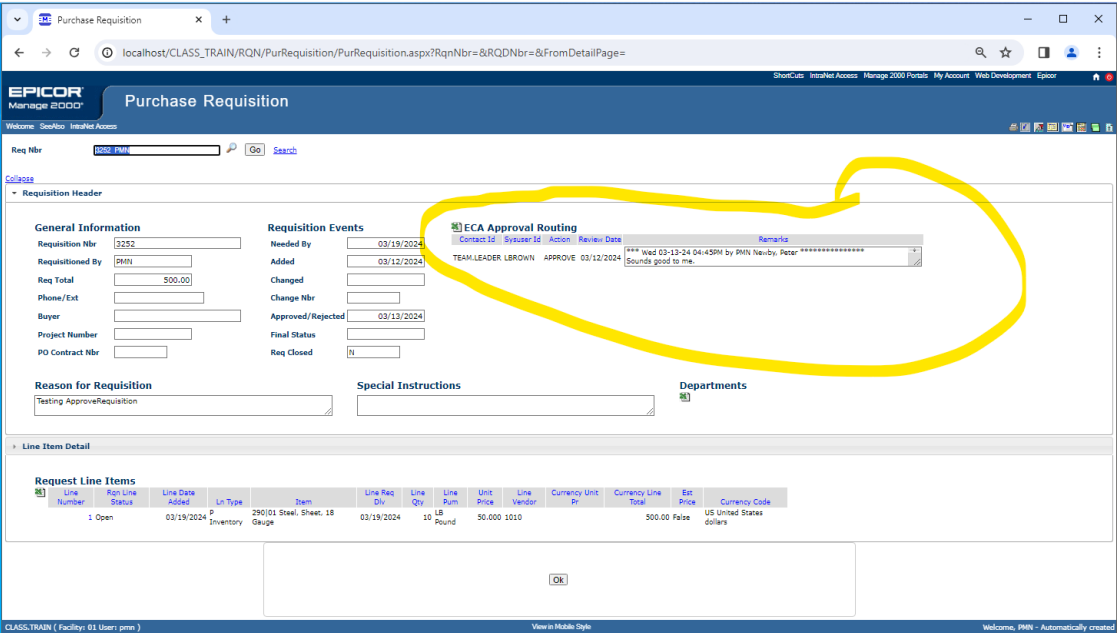
Req Line	Req Line Status	Line Date Added	Ln Type	Item	Line Req Div	Line Qty	Unit	Price	Line Vendor	Line Proj Id	Line Po Contract	Ln Ven Nbr	Mfg Part Nbr	Rev Lvl	Route	Inspect	Prod Key	Ln Taxable	Ln Buyer	Ln Fac Cd	Currency Unit Pr	Currency Line Total	Line Mfr Name	Source Insp	Mail Cert	Act Code	Disp Type	Disp Ref	Est Price	Currency Code
1	Open	03/19/2024	Inventory	290101 Steel Sheet, 18 Gauge	03/19/2024	10	LB Pound	50.000	1010		12345					Stockroom True		Exempt	S Harry Burton	01 Epicor Industries	500.00		False	False		S Inventory Part		False	US United States dollars	

At the bottom of the page, there is a 'Remarks' field and three buttons: 'Approve', 'Deny', and 'Cancel'.



# PURCHASE REQUISITION

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



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# MULTI-STAGE APPROVALS DEMO



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# QUESTIONS AND ANSWERS



NUGM 2024

THANK YOU

