

Global Requisition System (GRS) Approvals Release Notes

September 2011

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GRS Approvals Version: 1.0.1

Release Date: September 2011

QAD SE/EE Compatibility: QAD Enterprise Edition 2011.1

QAD .NET UI Version: 2.9.3.79

Related Documentation: For basic information on setting up and using GRS, see the QAD Enterprise Edition *Purchasing User Guide*.

This document includes the following major topics:

- Functionality Overview
- Installation Steps

Functionality Overview

This new functionality provides an intuitive, .NET UI-based collection, Requisition Approval (5.2.10.1), to replace the menu-driven approval process in the legacy version.

Note All previous menu functions are still available after installation; the legacy process can still be used.

The following topics describe highlights of this new user interface in these areas:

- Record Filtering
- Browse Information Grid
- Context-Sensitive Tool Bar Buttons
- Right-Click Access to Related Functions
- Enhanced Commenting Functionality
- Alternate Approvers

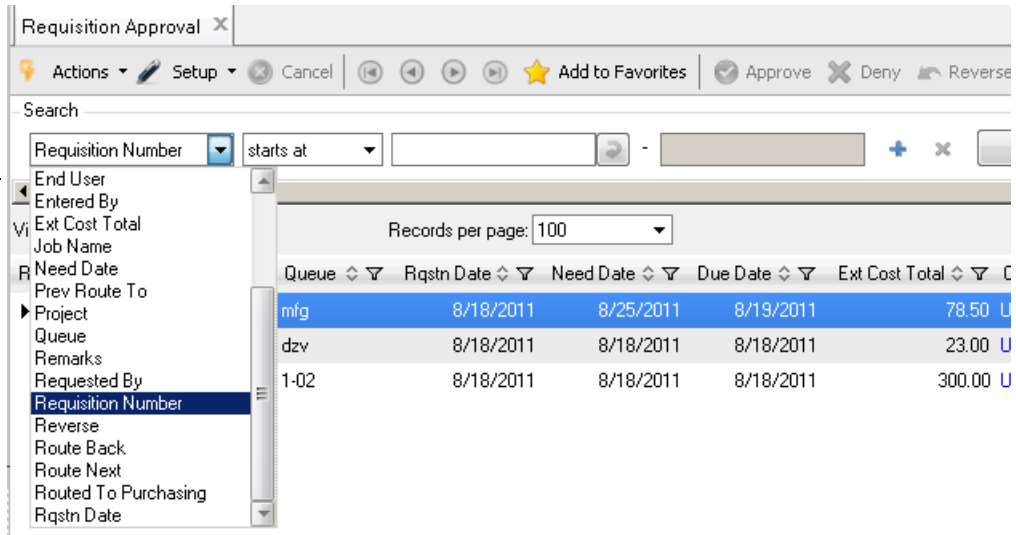
Record Filtering

In the initial browse view, use .NET UI filtering tools to select the requisitions you are interested in. For example, you can limit the display to only those requisitions that are currently in your queue. This is a standard .NET UI browse filter; click the Add icon (+) to create more filter criteria that reduce the list of requisitions.

Note Requisition Approval also includes the ability to filter based on whether the logged-in user is defined as an alternate or administrative approver. See “Alternate Approvers” on page 5 for information.

Fig. 1
Requisition Approval, Browse Screen

Define as many filter criteria as you need.



Browse Information Grid

The system displays information about selected requisitions in the browse view. Without using an additional program, you can determine the following requisition details by scrolling horizontally:

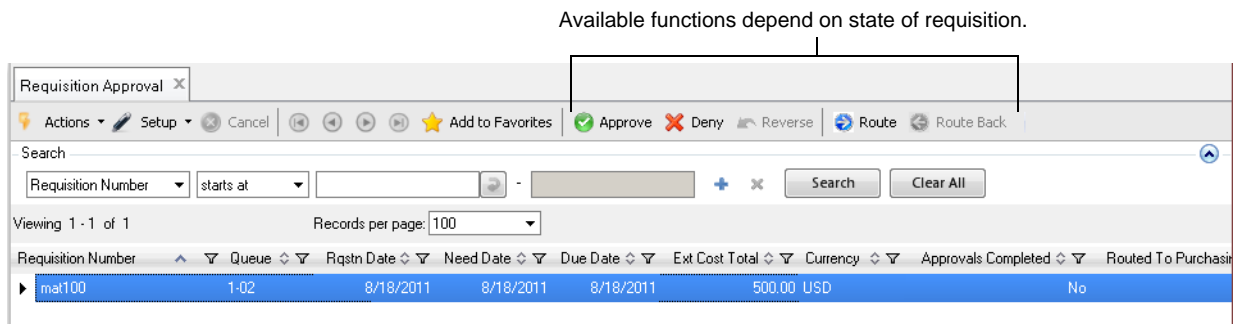
- Requisition Number
- Need Date
- Currency
- Previous Route To
- End User
- Project
- Queue
- Due Date
- Approvals Completed
- Requested By
- Remarks
- Job Name
- Requisition Date
- Extended Cost Total
- Routed to Purchasing
- Entered By
- Category
- Days in Queue

Note You can use standard .NET UI browse functionality to customize the display. For example, drag and drop a column heading to resequence columns, or right-click on the heading row to select other options.

Context-Sensitive Tool Bar Buttons

Context-sensitive tool bar buttons indicate which actions are available for the requisition in focus.

Fig. 2
Requisition Approval, Buttons



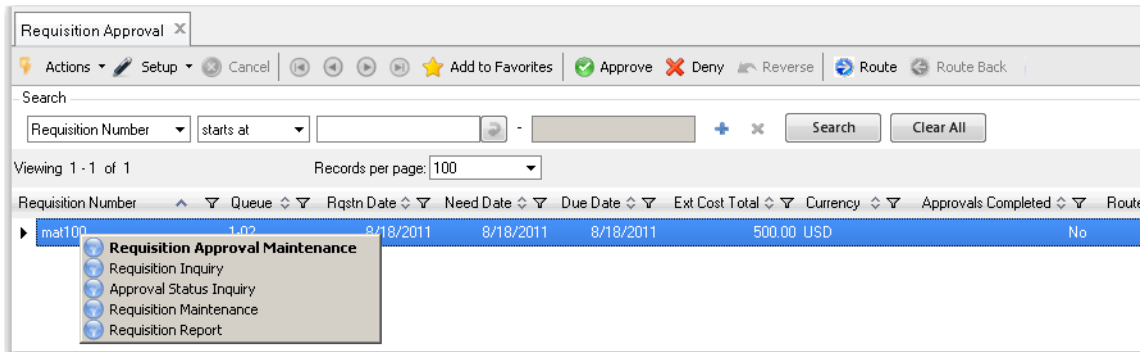
Buttons display in color when they represent available actions. For example, if you highlight a requisition and click the green Approve button, the button turns gray, since approval is no longer an appropriate

action. However, the Reverse button, which was previously gray, changes to green to show that reversal is now a potential part of the work flow.

Right-Click Access to Related Functions

In some cases, you might want to view the approval history of a requisition, or modify it before approving. You can access such functions directly from Requisition Approval by right-clicking on a requisition in the browse view.

Fig. 3
Requisition Approval, Right-Click Menu



The selected function displays at the bottom of the screen. The key field is already populated with the selected requisition number. Click Next to launch the program.

Enhanced Commenting Functionality

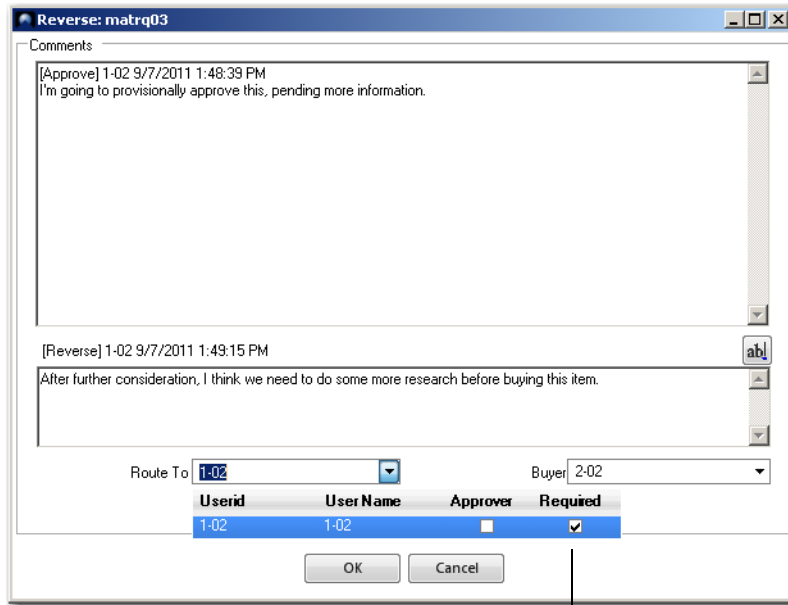
When you approve, deny, reverse, or route a requisition, you are prompted to enter optional comments.

Requisition Approval offers enhanced commenting capabilities compared with the standard approval and routing programs:

- You can enter comments of unlimited length.
- You can cut and paste text into the comments field. For example, after denying a requisition, you might paste in the manufacturer's description of an item that you feel is a better alternative before routing the requisition back to the originator.
- The look-up on the Route To field sorts with required approvers at the top of the list.

Note The comments history for the requisition displays in the top field of the comments window.

Fig. 4
Requisition Approval, Comments Window



Route To lookup sorts with required approvers at top of list.

Alternate Approvers

An additional form of filtering is available that is related to alternate and administrative approvers, who can optionally be associated with primary approvers in the following programs:

- Horizontal Approver Maintenance
- Job Approver Maintenance
- Product Line Approver Maint
- Vertical Approver Maintenance

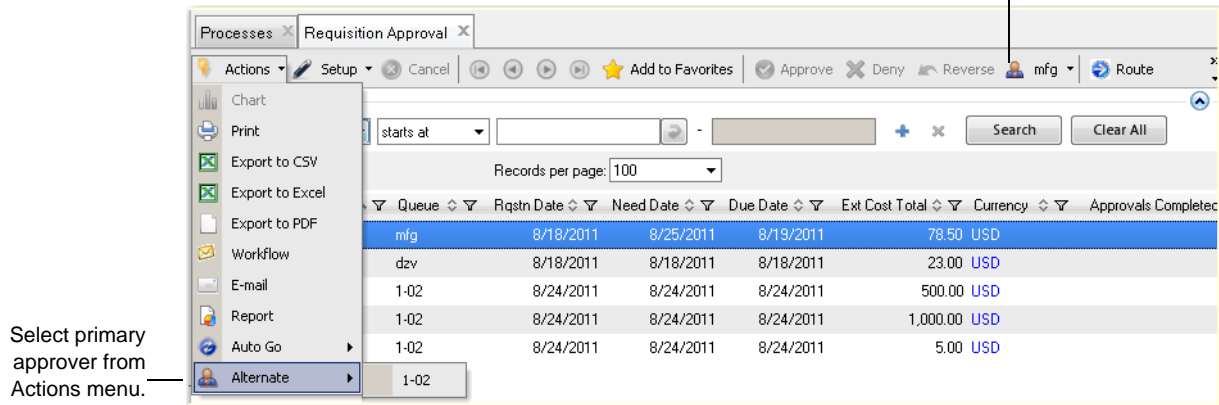
If you are the logged-in user and are defined as an alternate or admin, click on Alternate on the Actions menu. The system displays a list of approvers for whom you are an alternate or admin. When you select one, the browse lists only requisitions for those approvers.

Note If your user ID is not associated as an alternate or admin with any approvers that match the requisitions shown in the browse, the Alternate item does not display on the Actions menu.

After you have selected an ID from Actions|Alternate, an additional button displays on the tool bar. Use it to toggle between the full list of requisitions (subject to other filter criteria) and the list based on your status as alternate or admin for the selected primary approver.

Fig. 5
Requisition Approval, Alternate Approver Navigation Tools

Use icon to toggle filters based on logged-in user's status as alternate or administrative approver.



Installation Steps

Two options are available for installing this new functionality:

- Automatic Installation (Recommended)
- Manual Installation

Automatic Installation (Recommended)

This method points to the QDT installation directory and runs automatically.

Use the following command to start the installation:

```
[QDT]/pstage/netui-module-standard/install.sh -Dconfig.src=[QDT] -Dconfig.env=[Environment]
-Dinstallation=[GRS ZIP] -i silent
```

Where:

- [QDT] = The absolute path where the QAD Deployment Toolkit is installed.
- [Environment] = The environment into which GRS should be installed.
- [GRS ZIP] = The absolute path to the GRS installer ZIP archive that was downloaded from the electronic download site.

For example:

```
/dr01/qadapps/qdt/pstage/netui-module-standard/install.sh -Dconfig.src=/dr01/qadapps/qdt
-Dconfig.env=live-Dinstallation=/installs/grs_install/netui-module-grs-installer-vm-1.0.0.15-
resources.zip -i silent
```

Manual Installation

Use the following sequence of tasks to install manually:

- 1 Verify Java 1.6 is in your \$PATH and appears before any other Java versions:

```
$echo $PATH
```

For example:

```
$/dr01/java/jdk1.6.0_21/bin:/dr01/scripts:/progress/dlc/bin:/usr/local/sbin:/usr/local/bin:/s
bin:/bin:/usr/sbin:/usr/bin:/dr01/tomcat/8080/bin:/progress/dlc:/usr/java/jdk1.5.0_22/bin:/us
r/bin:/usr/local/sbin:/sbin:/bin:/usr/sbin:/bin:/progress/dlc/bin:/home/demo-admin/bin
```

2 Unzip the GRS bundle to a local directory on your server:

```
$unzip netui-module-grs-installer-vm-1.0.0.15-resources.zip
```

3 Run the installer:

```
$ ./install.ks
```

- You are prompted for the Environment source; this is the QDT installation directory for your configuration.
- Choose the target environment.
- Confirm the values to complete the installation process.

4 Start a .NET UI client session. Depending on system configuration settings, you may be prompted to update. Select Yes.

The Requisition Approval (5.2.10.1) menu option is now available.

