

# **Global Requisition System (GRS) Approvals Release Notes**

**March 2012**

*Release Notes for Version 1.0.3 (SE 2011) 2*

# Release Notes for Version 1.0.3 (SE 2011)

**GRS Approvals Version:** 1.0.3

**Release Date:** March 2012

**QAD SE/EE Compatibility:** QAD Standard Edition 2011

**QAD .NET UI Version:** 2.9.4

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

For installation instructions, see “Installing GRS Approvals” on page 6.

## QXtend Requirement

This release requires QXtend 1.7.2 to be installed with QAD Standard Edition 2011. QXtend 1.7.2 is not the default version included with QAD Standard Edition 2011.

## Functionality Overview

This new functionality provides an intuitive, .NET UI-based collection, Requisition Approval, 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:

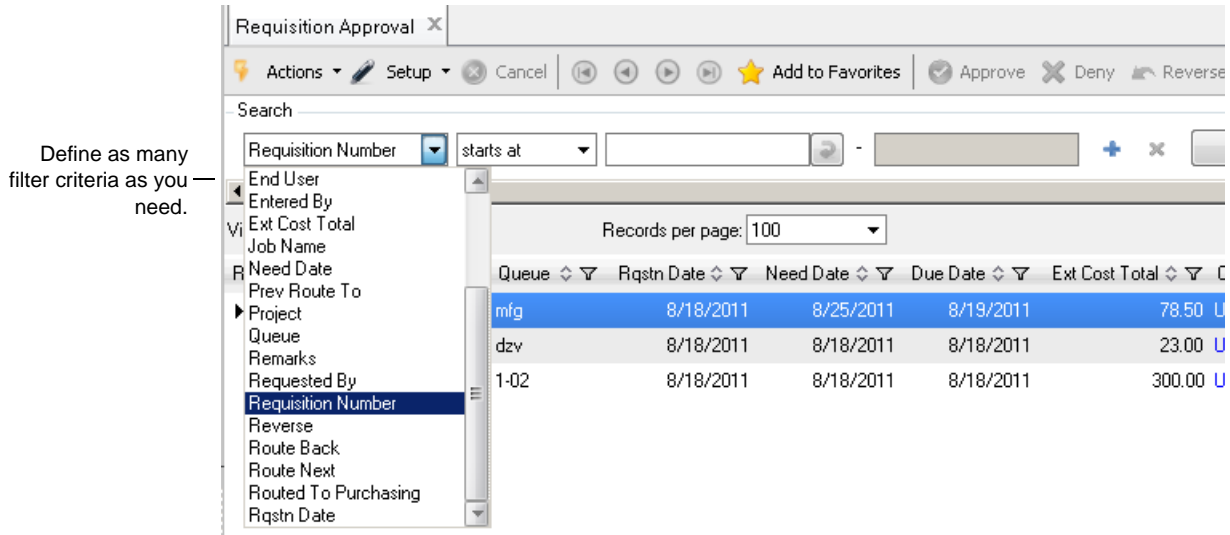
- Record Filtering
- Browse Information Grid
- Context-Sensitive Tool Bar Buttons
- Right-Click Access to Related Functions
- Enhanced Commenting Functionality
- Alternate Approvers

## 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



### 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:

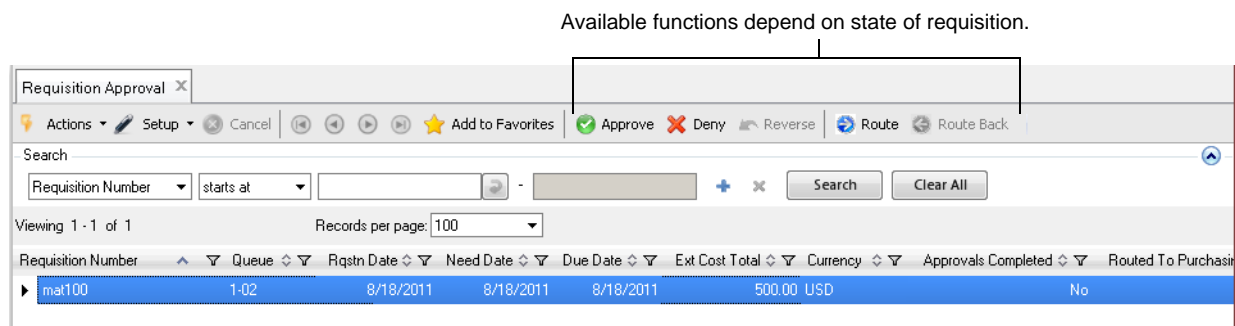
- Requisition Number
- Need Date
- Currency
- Previous Route To
- End User
- Project
- Queue
- Due Date
- Approvals Completed
- Requested By
- Remarks
- Job Name
- Requisition Date
- Extended Cost Total
- Routed to Purchasing
- Entered By
- Category
- Days in Queue

**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



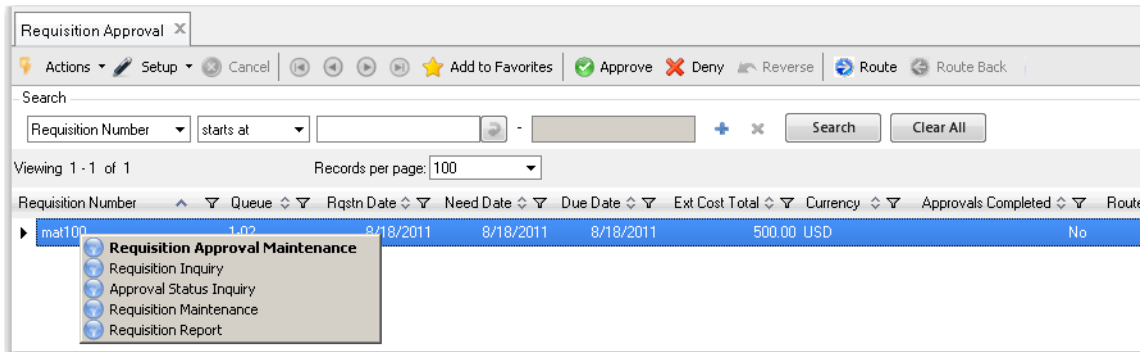
Buttons display in color when they represent available actions. For example, if you highlight a requisition and click the green Approve button, the button turns gray, since approval is no longer an appropriate

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

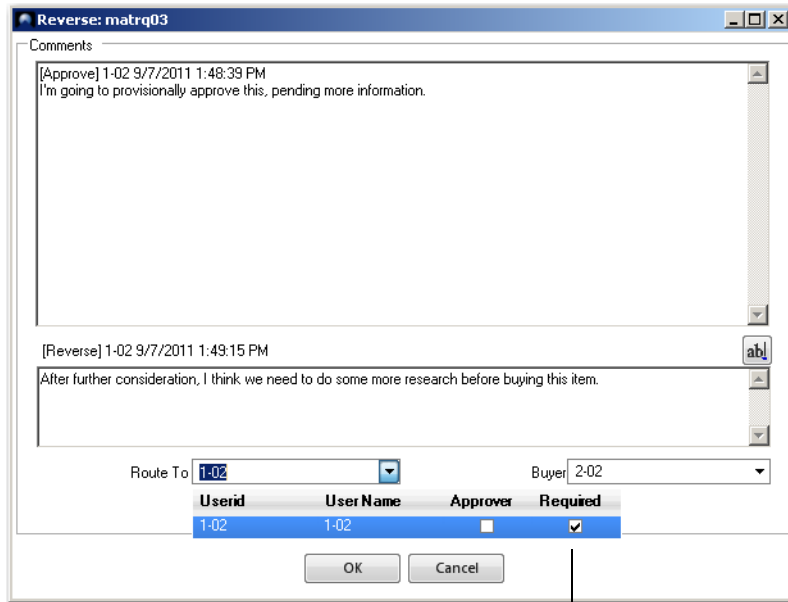
When you approve, deny, reverse, or route a requisition, you are prompted to enter optional comments.

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

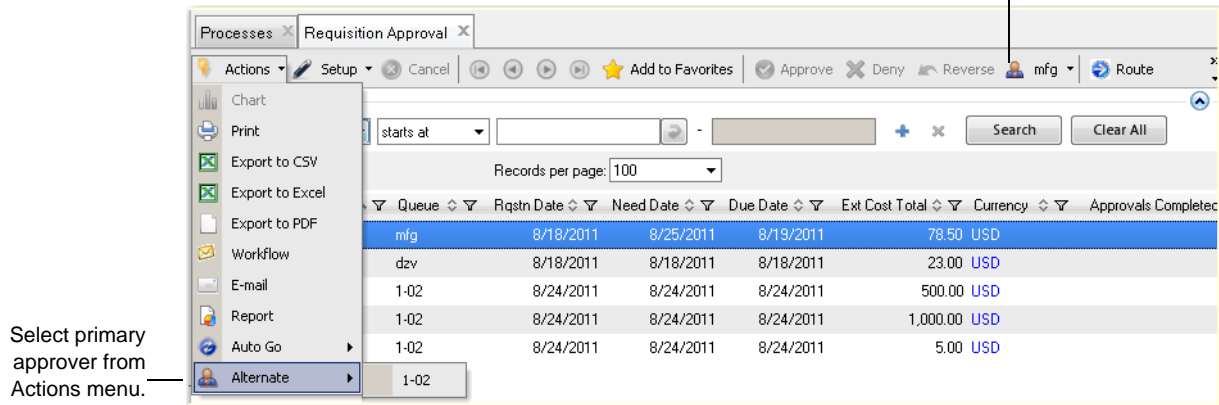
If you are the logged-in user and are defined as an alternate or admin, click on Alternate on the Actions menu. The system displays a list of approvers for whom you are an alternate or admin. When you select one, the browse lists only requisitions for those approvers.

**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.



## Installing GRS Approvals

- 1 Install interface file:
  - a Locate the `com/qad/shell/interface` directory. This directory resides under the User Interface Server Install Directory specified in MFG/UTIL under the menu UI/Configure UI Environment Parameters.
  - b Copy `xrc/interface/grsapi.p` (in this bundle) to the server at `com/qad/shell/interface`.
  - c Run MFG/UTIL.
  - d Select menu UI/Build UI Configuration.
  - e Select a UI Configuration Name.
  - f Select the Advanced button.
  - g Clear all check boxes except Compile User Interface Programs.
  - h Select the Build button.
  - i When the build is finished, check the display to verify that no errors occurred.
- 2 Install QAD Applications files:
  - a Look at the files (in this bundle) in `xrc/mfg` and back up any of these that exist in the `xrc` directory on your server.
  - b Copy the files (in this bundle) from `xrc/mfg` to the `xrc` directory on your server.
  - c Use MFG/UTIL to compile these by selecting menu Programs/Compile Procedures and then using the `grscompile.wrk` list in this bundle for the Compile List File.
- 3 Load Browse:
  - a Run the QAD .NET UI client.
  - b Run Browse Maintenance and use menu Actions/Import... to import `rq161.brwx` (in this bundle).
- 4 Create menu

Run Menu System Maintenance and create a menu with the following data:

- Menu = 5.2
- Selection = 10
- Label = Requisition Approval
- Exec Procedure = rqbr161.p

**5** Install Home Server files

- a** Locate the QAD Home Server (qadhome).
- b** Locate the packages directory.
- c** Copy the zip file (qad.plugin.grs-2.9.4.41.8058.zip) into that packages directory.
- d** Unzip it.
- e** Locate packages/plugins/manifest.qpkg.
- f** Edit this file by adding the following line before the closing element:  
`<package path="" ref="{Repos}/plugins/qad.plugin.grs/manifest.qpkg" />`
- g** Save and close the file.

Now when users launch the .NET UI they will be prompted to update and receive the plugin.

