

Identification

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Table of Contents

Identification.....	1
Table of Contents	1
What is Approval Express	2
Purpose.....	2
Processing an Approval Request	3
Approving a Purchase Order.....	5
Rejecting a Purchase Order	6
Viewing Approval History	7
Viewing Order Text	8
Viewing Additional Line Text	9
Viewing the Version of Approval Express on the desktop.....	11
Closing Approval Express on the Desktop	12
Password Protection during the approval process.....	13
Password protection during the rejection process.....	14
Changing your password	15
When does my new password take affect.....	16

What is Approval Express

This software simplifies the approval or rejection of JDE purchase orders using a desktop pc.

Users no longer have to sign onto the corporate network or sign onto JDE to approve or reject their purchase orders. The process is as simple as opening an email attachment and pressing a couple of buttons.

Further, this can easily be extended to include the approval of other document types such as invoices, or expenses.

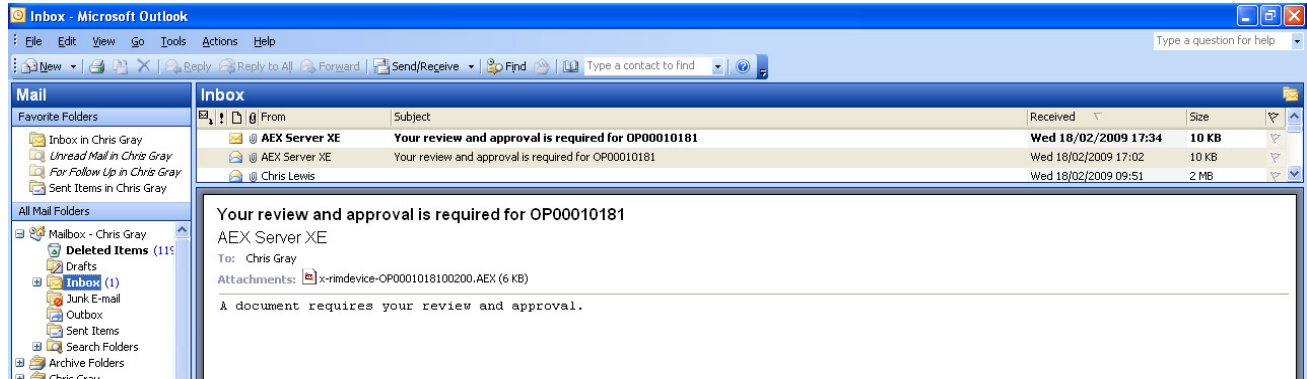
Purpose

This document provides users of approval express with detailed instructions on how to use the approval express software on your desktop.

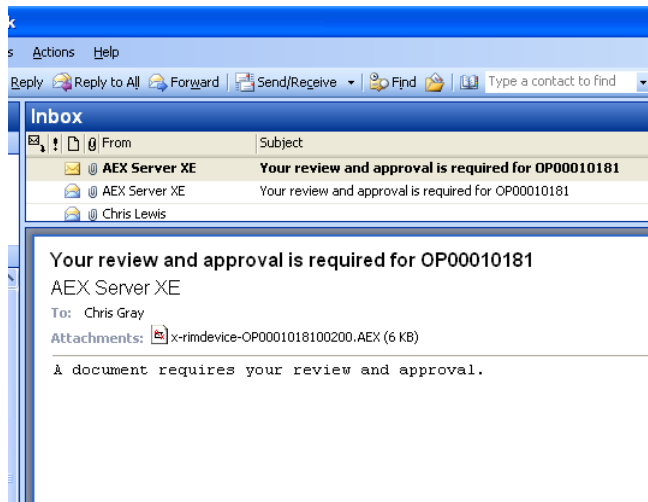
This document will explain how to both approve and also reject a purchase order using Approval Express on your desktop.

Processing an Approval Request

All approval requests will be emailed to you, and so you will first be aware that a JDE document requires approval when you receive an email on your desktop.



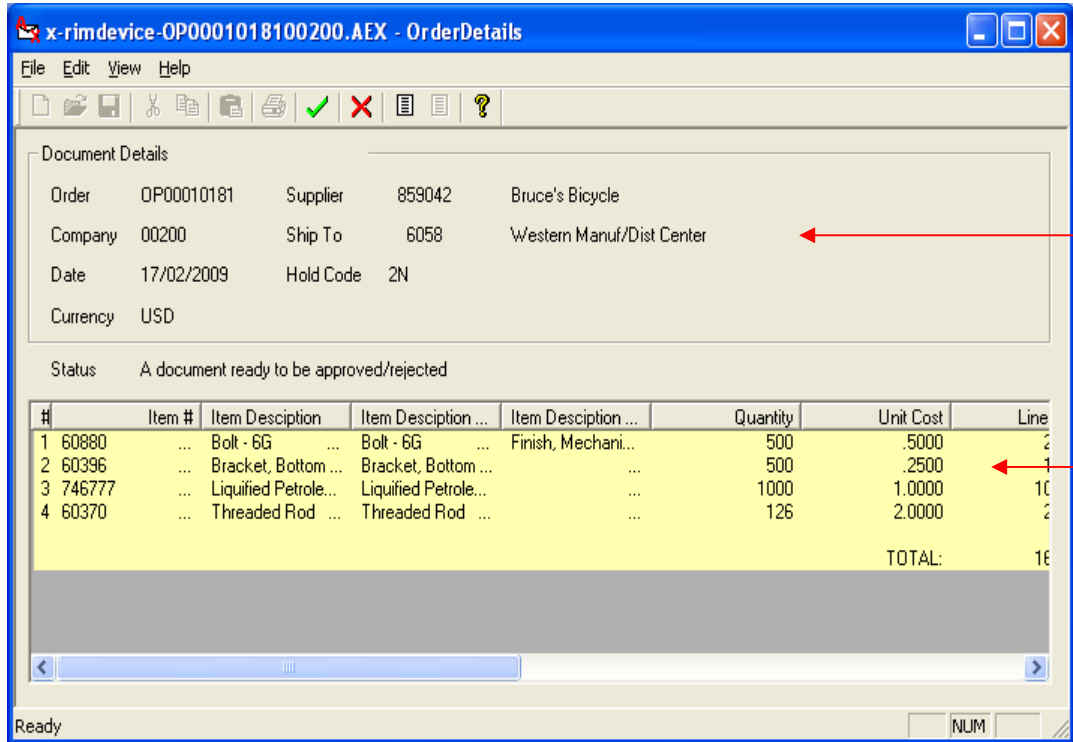
Once you have received emails, you should use your desktop to open and review your emails in the normal way. When you receive a request to approve a purchase order the email will look similar to the following



This email indicates that you have a JDE purchase order (document type OP, document number 10181) that requires your approval.

In order to either approve or reject the purchase order, you will have to open the attachment. Double click on the attachment to open the document.

You will then be presented with the details of the purchase order as follows



The screenshot shows a Windows application window titled "x-rimdevice-OP0001018100200.AEX - OrderDetails". The window has a menu bar (File, Edit, View, Help) and a toolbar with icons for file operations and a help icon. The main content is divided into two sections:

- Header details:** A section titled "Document Details" containing a table of order information. A red arrow points to this section from the label "Header details".
- Detail lines:** A table listing items with columns for Item #, Item Description, Quantity, and Unit Cost. A red arrow points to this section from the label "Detail lines".

Document Details				
Order	OP00010181	Supplier	859042	Bruce's Bicycle
Company	00200	Ship To	6058	Western Manuf/Dist Center
Date	17/02/2009	Hold Code	2N	
Currency	USD			

Status: A document ready to be approved/rejected

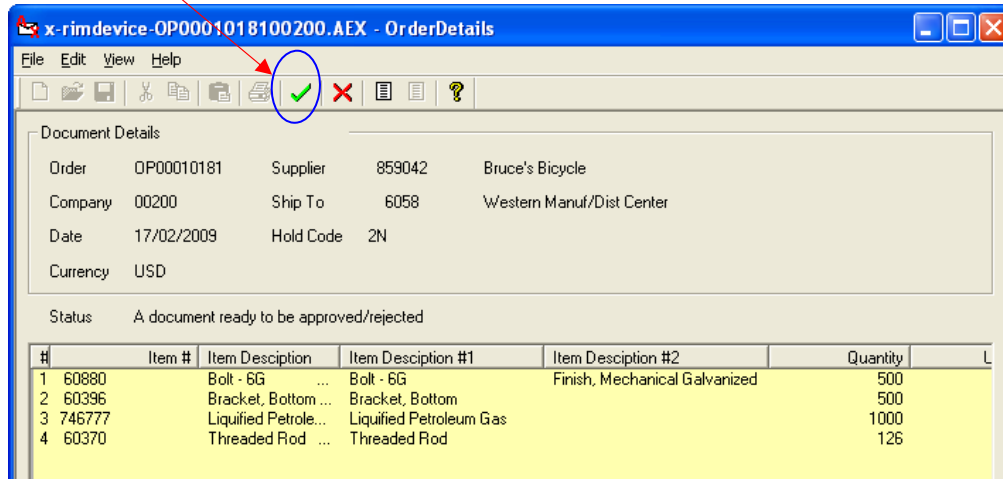
#	Item #	Item Description	Item Description ...	Item Description ...	Quantity	Unit Cost	Line
1	60880	Bolt - 6G	Bolt - 6G	Finish, Mechani...	500	.5000	2
2	60396	Bracket, Bottom	Bracket, Bottom		500	.2500	1
3	746777	Liquified Petrole...	Liquified Petrole...		1000	1.0000	10
4	60370	Threaded Rod	Threaded Rod		126	2.0000	2
TOTAL:							16

The purchase order header details are detailed in the top half of the screen, and the detail lines are summarized towards the bottom half of the screen. You may have to use the scroll bar to view additional information contained in the detail lines.

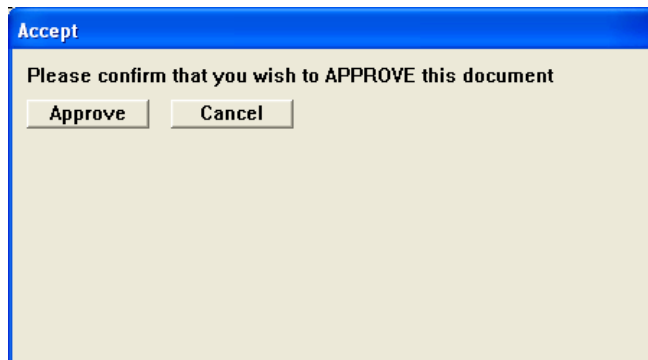
Approving a Purchase Order

To approve the purchase order, select the green tick as shown below.

Approve purchase order



You will be taken to a confirmation screen, where you will be allowed to confirm the approval of the purchase order.



To approve the purchase order, select the **'Approve'** button. Upon successful approval you will be returned to the original email

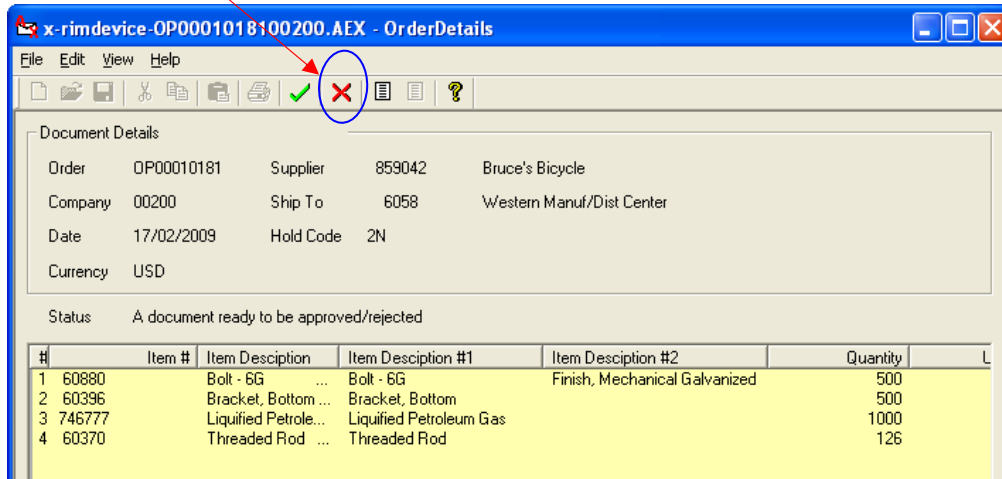
If you do not want to approve the purchase order at this time, select the **'Cancel'** button. This will take you back to the main screen

Upon confirmation approval express will automatically close. The purchase order has now been approved and JD Edwards will be updated.

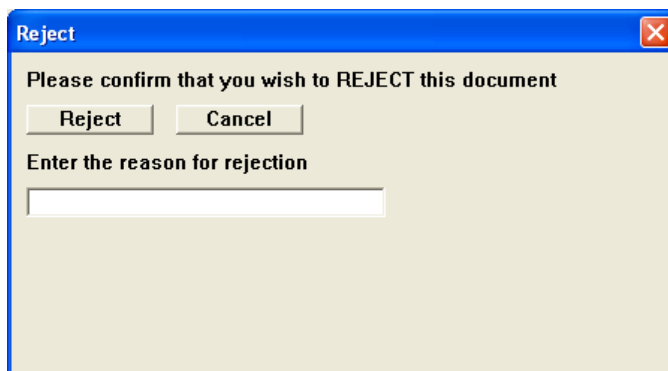
Rejecting a Purchase Order

To reject the purchase order, select the red cross as shown below.

Reject purchase order



You will be taken to a confirmation screen, where you will be allowed to confirm the rejection of the purchase order.



You will be asked to enter a reason why you are rejecting the purchase order. Type a short message giving the reason for rejection. Please note that the reason for rejection is mandatory

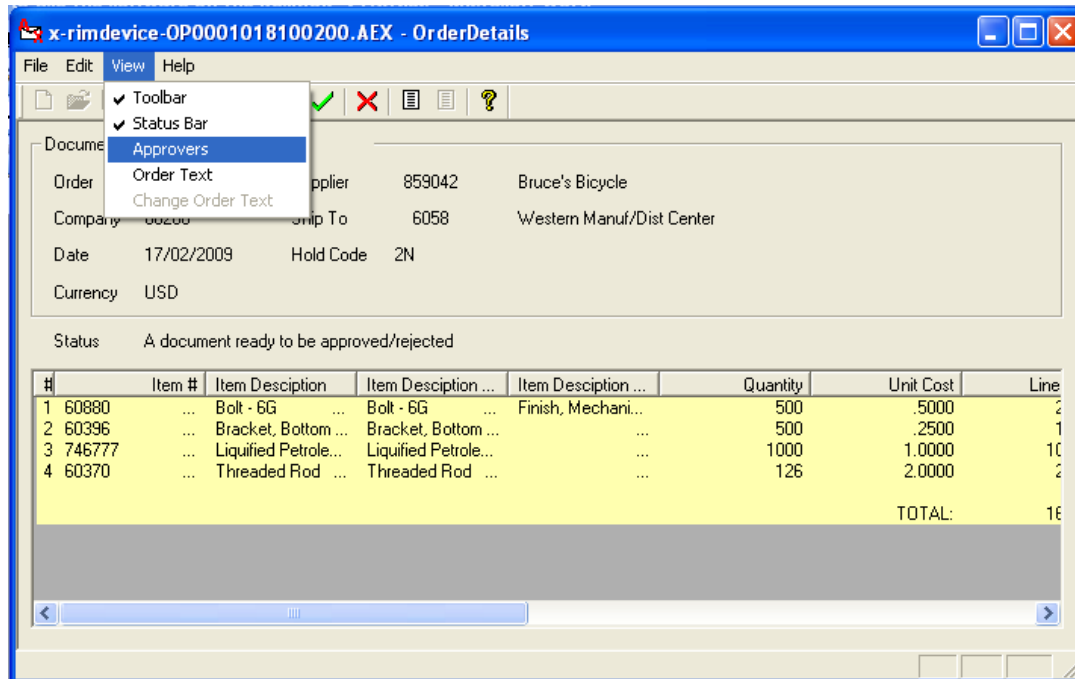
To reject the purchase order, press the **'Reject'** button. Upon successful rejection you will be returned to the original email

If you do not want to reject the purchase order at this time, select the **'Cancel'** button. This will take you back to the main screen

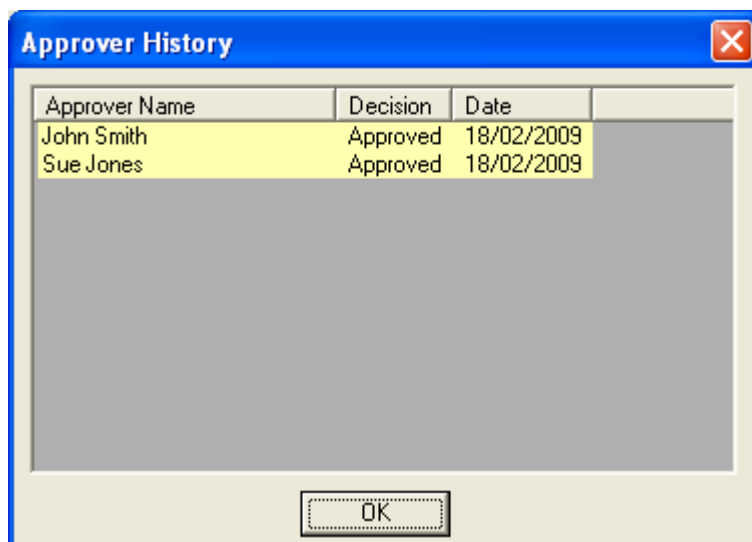
Upon confirmation approval express will automatically close. The purchase order has now been rejected and JD Edwards will be updated.

Viewing Approval History

You may view previous purchase order approvers by selecting Approvers from the view menu. This option will be grayed out if there are no previous approvers.



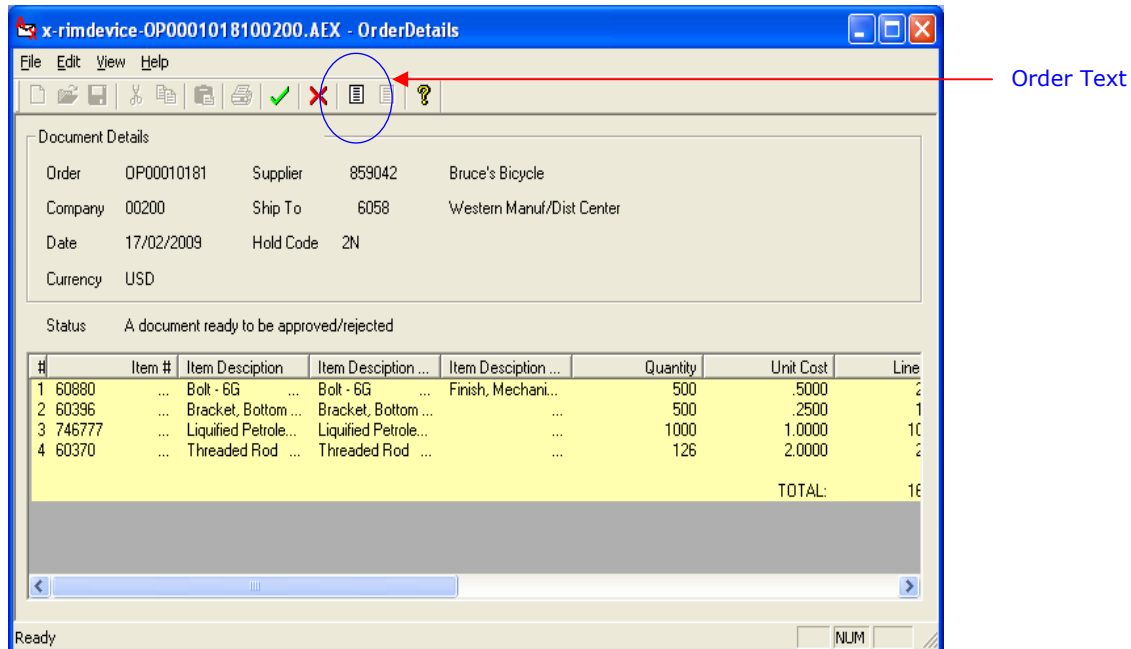
Previous approvers will be displayed.



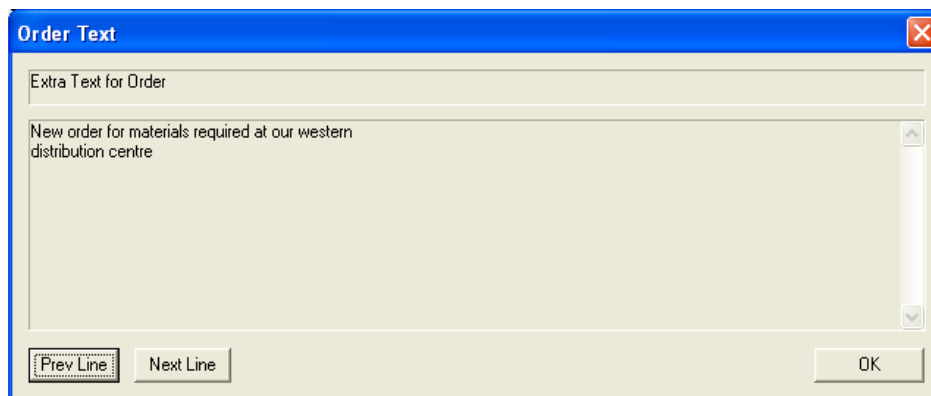
Once you have finished reading the approval history, press the 'OK' button to close this screen.

Viewing Order Text

To view the order text select the '**(Order Text)**' icon, located at the top of the screen.



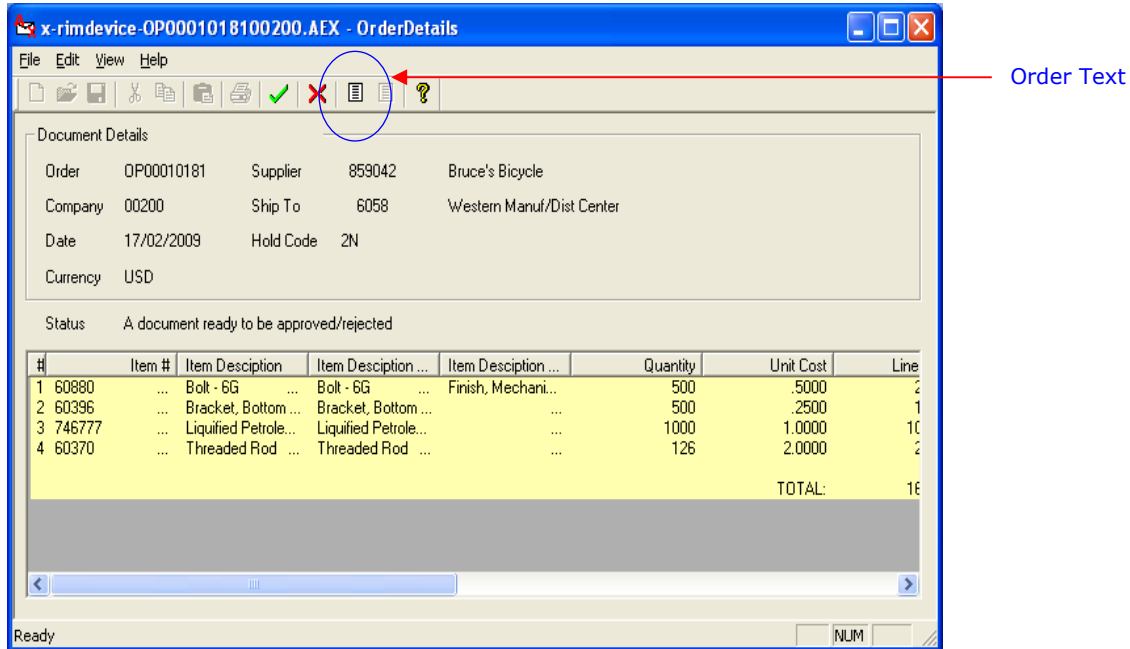
Details of the order text associated with the purchase order will then be displayed on the screen.



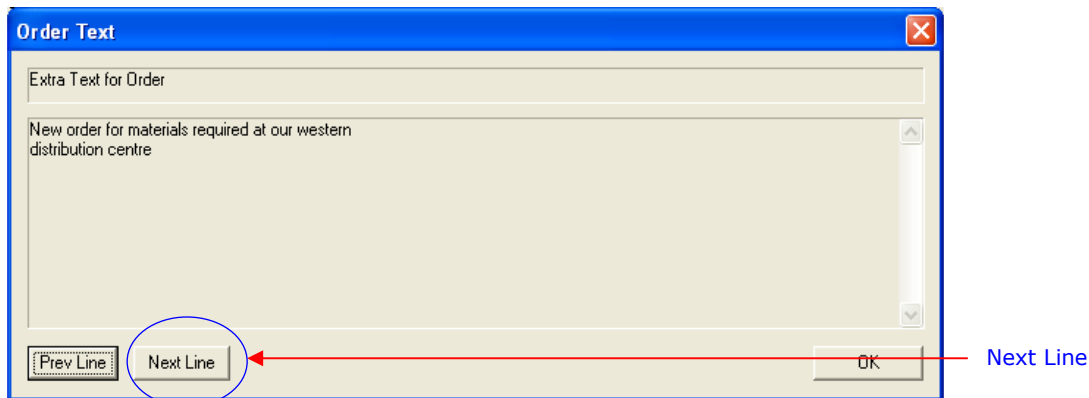
Once you have finished reading the order text, press the '**OK**' button to close this screen.

Viewing Additional Line Text

To view the additional line text select the '**Order Text**' icon, located at the top of the screen.

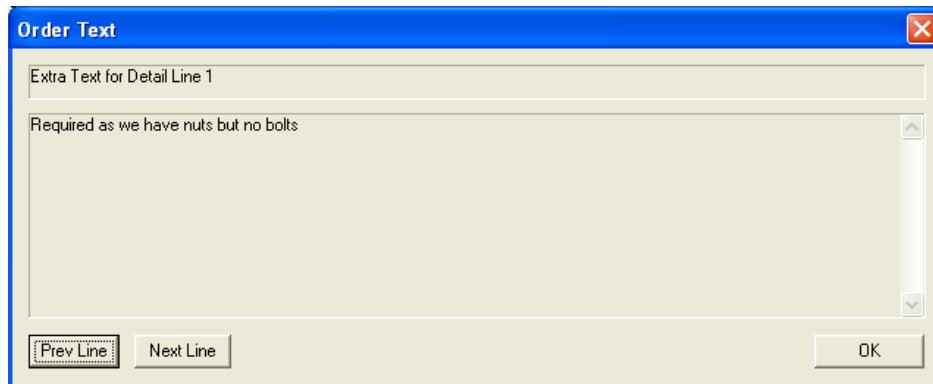


Details of the order text associated with the purchase order will then be displayed on the screen.

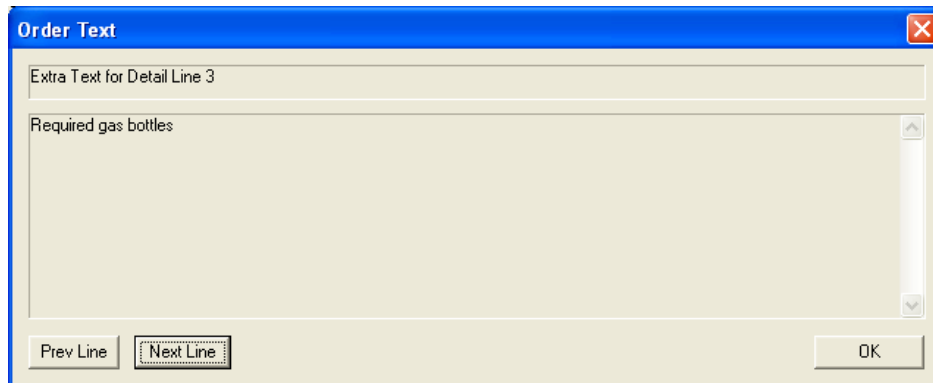


The additional line text can be obtained by pressing the '**Next Line**' button located on the bottom of this screen.

Once you have pressed the 'Next Line' button, the additional text attached to each detail line will be displayed.



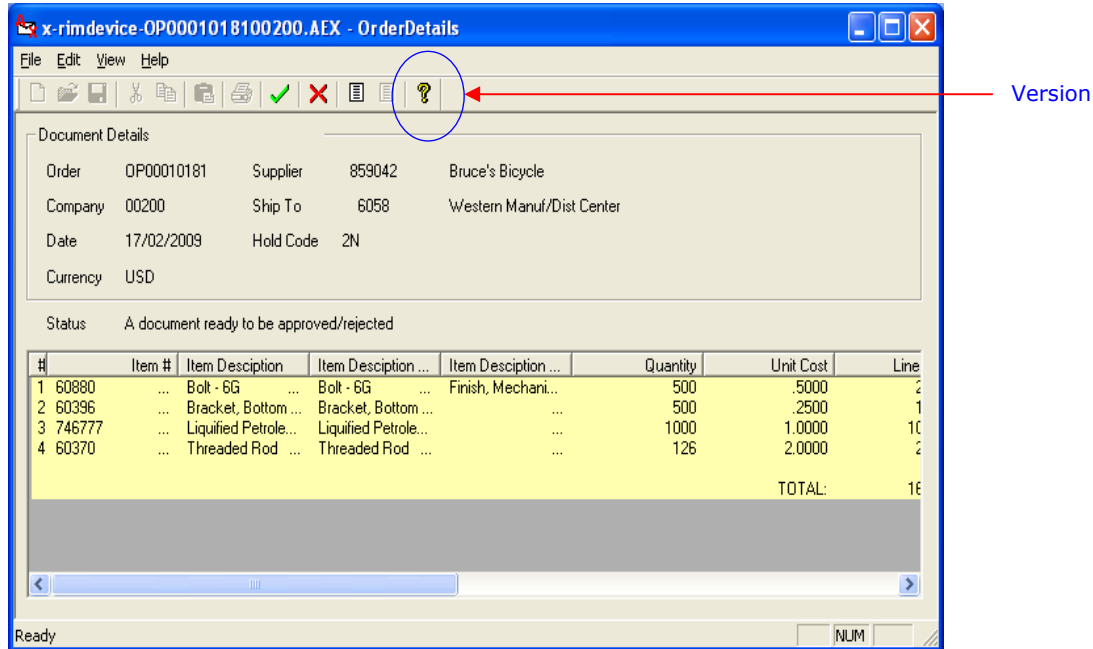
To cycle through the text for each detail line, use the '**Prev Line**' and '**Next Line**'.



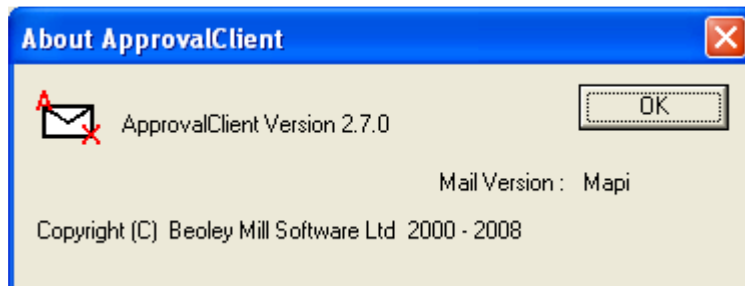
Once you have finished reading the additional line text, press the '**OK**' button to close this screen.

Viewing the Version of Approval Express on the desktop

To view the version of approval express software, press the '**question mark**' located at the top of the screen.



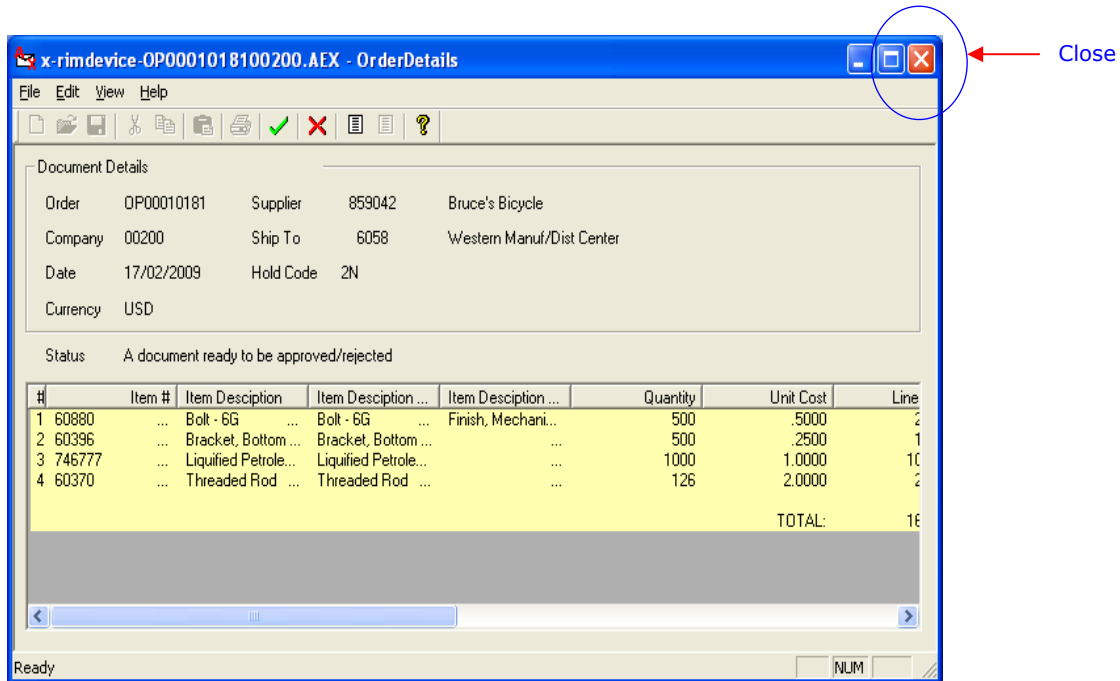
A dialog box will be displayed detailing the version of approval express



Press the '**OK**' button to close this screen.

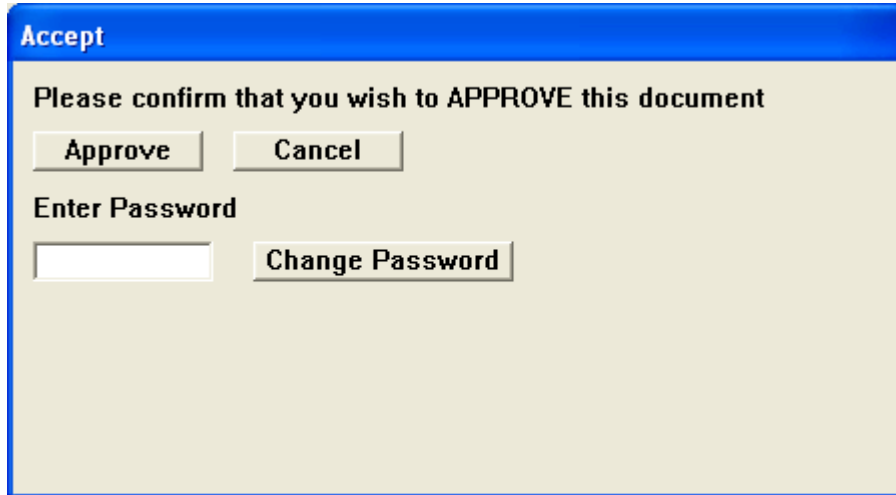
Closing Approval Express on the Desktop

To close approval express, click the red cross at the top right of the Approval Express window.



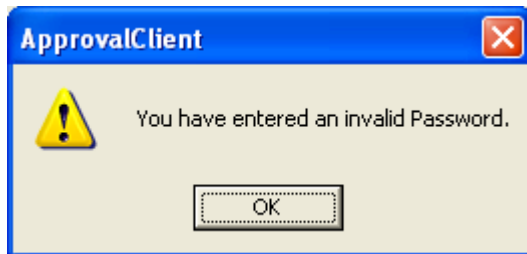
Password Protection during the approval process.

If password protection is turned on, you will be prompted to enter a password before you can approve the purchase order.



Enter your password in the textbox indicated. Then press **'Approve'**

If you omit or enter an invalid password you will be presented with the message

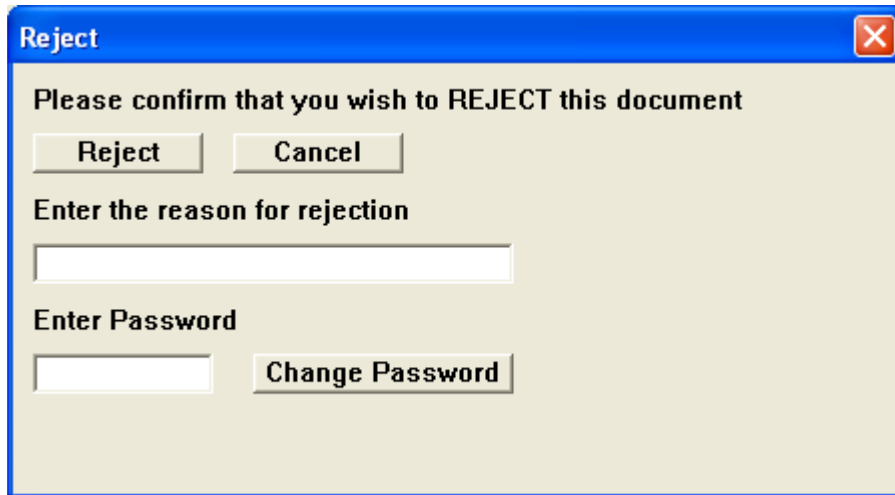


You will not be allowed to approve the Purchase Order until a valid password is entered.

Select **'OK'** to close the warning message and continue.

Password protection during the rejection process

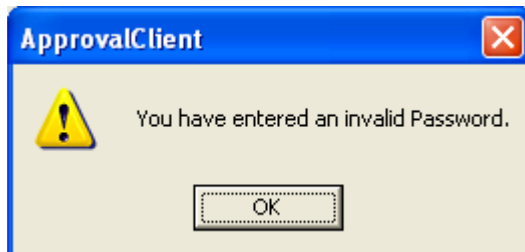
If password protection is turned on, you will be prompted to enter a password before you can reject the purchase order.



The 'Reject' dialog box has a blue title bar with the text 'Reject' and a close button. The main area is light beige and contains the following elements: a bold heading 'Please confirm that you wish to REJECT this document', two buttons labeled 'Reject' and 'Cancel', a bold heading 'Enter the reason for rejection' followed by a text input field, a bold heading 'Enter Password' followed by a password input field and a 'Change Password' button.

Enter a reason for rejection (mandatory). Enter your password. Then press **'Reject'**.

If you omit or enter an invalid password you will be presented with the message



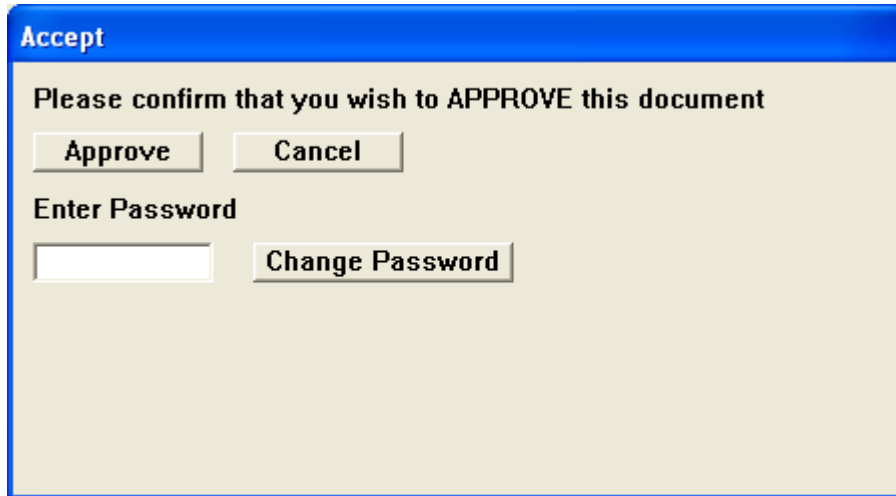
The 'ApprovalClient' dialog box has a blue title bar with the text 'ApprovalClient' and a close button. It features a yellow warning triangle icon on the left. The main text reads 'You have entered an invalid Password.' Below the text is a single button labeled 'OK'.

You will not be allowed to reject the Purchase Order until a valid password is entered.

Select **'OK'** to close the warning message and continue.

Changing your password

If password protection is turned on, you can change your password at any time.



To change your password, from either the **(Approve)** or the **(Reject)** screens press the **'Change Password'** button located roughly in the middle of the screen.

You will be taken to the following screen



You will be prompted to:

1. Enter your old password
2. Enter your new password
3. Enter your new password again to confirm.

Select the **'OK'** button, located in the bottom part of the screen, to confirm the password change and continue.

When does my new password take affect

If you change your password, the new password details are sent back to JD Edwards and stored in the database (encrypted).

Any new purchase order approval requests that you receive will require you to enter the new password.

Please note that existing purchase order approval requests that you already have in your email inbox will still be configured to use/accept your old password.