ITEM JOURNAL APPROVAL WORKFLOW

App For Microsoft Dynamics 365 – Business Central

AMJS CONSULTING

The document introduces the new "Item Journal Approval Workflow" feature within Microsoft Dynamics Business Central, designed to enhance accuracy and streamline operations. This functionality implements a robust approval workflow across various item journals, ensuring better control, compliance, and operational efficiency. By integrating this feature, the solution provides a centralized platform for efficient, organized, and compliant management of inventory and capacity processes within the Dynamics Business Central environment.

Item Journal Approval Workflow

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FEATURE HIGHLIGHTS

The Item Journal Approval Workflow enhances your Business Central experience by implementing a comprehensive control and approval system. This robust workflow solution ensures accuracy, compliance, and operational efficiency across the following journals:

- Physical Inventory Journals for managing stock counts and inventory adjustments
- Item Journals for handling general item transactions
- Item Reclassification Journals for modifying item classifications and categories
- Recurring Item Journals for managing repetitive item transactions
- Item Revaluation Journals for updating item values and costs
- Capacity Journals for recording resource capacity
- Consumption Journals for tracking material usage
- Output Journals for documenting production output
- Recurring Capacity Journals for managing regular capacity entries
- Recurring Consumption Journals for handling regular material usage records
- Recurring Output Journals for tracking periodic production outputs

This integrated approval process streamlines your operations while maintaining strict control over all item and capacity-related workflows.

I. WORKFLOW TEMPLATE

By automating the approval process, workflows help ensure that the process is consistent, efficient, and transparent. They also provide a clear audit trail of who approved what and when, which can be valuable for compliance purposes.

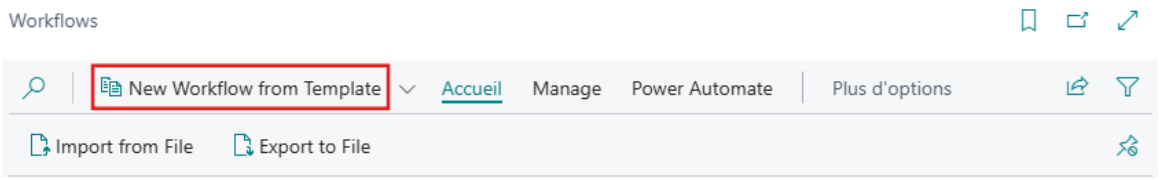
A "Workflow Template" is a pre-configured workflow model available on the Workflow Templates page in Business Central. It can be copied to create new workflows.

You can set up a new workflow in the **Workflows** list for the **Item Journal Batch Approval Workflow** or the **Item Journal Line Approval Workflow**.

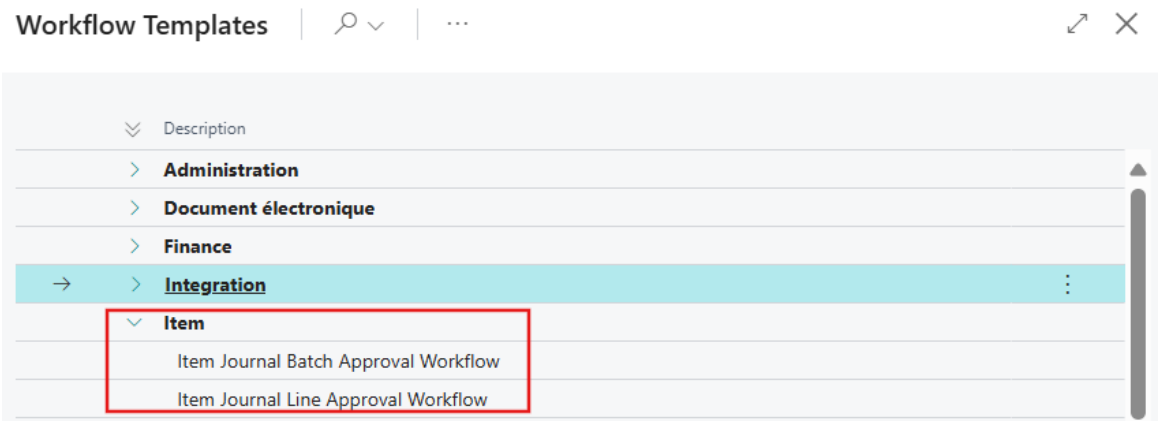
To create **Item Journal approval workflow**:

a. Choose the icon, enter **Workflows**, then choose the related link.

b. Choose the **New Workflow from Template** action. The **Workflow Templates** page opens.

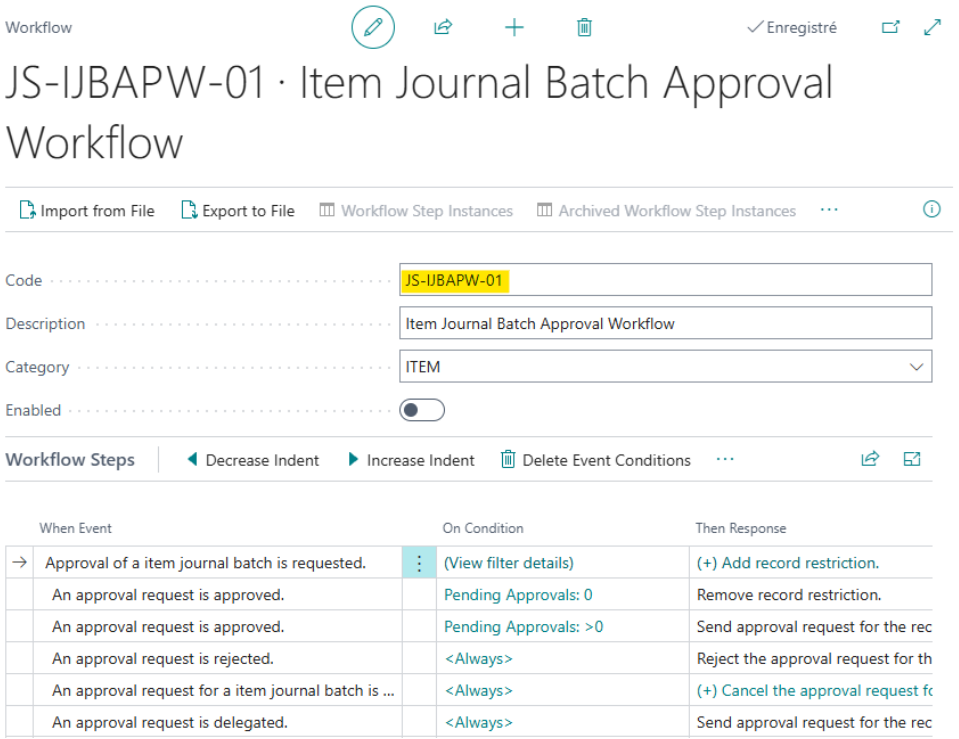


c. Select an **Item Journal approval workflow**, then choose **OK**.



The **Workflow** page opens for a new workflow containing all the information of the selected template. The value in the **Code** field is extended with, for example, "-01" to indicate this is the first workflow created from the workflow template.

Exemple : **Item Journal Batch Approval Workflow**



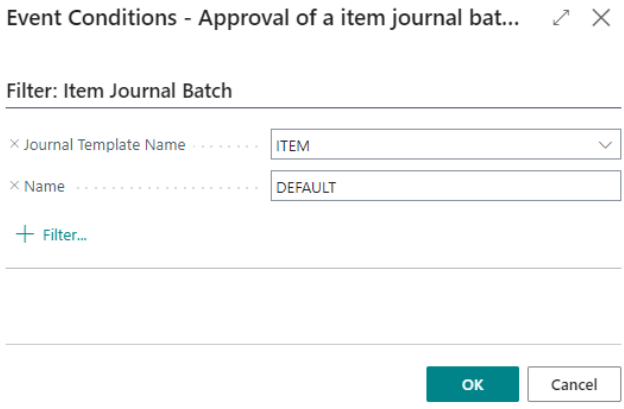
d. Configure **On Condition**

The **On Condition** field is used to specify criteria that must be met for the workflow event to be executed.

By default, the workflow runs on all **Item Journal Batches**. However, we can create separate workflows and set specific conditions for each one, allowing us to handle different Item Journal Batches in distinct ways.

Click **Always** in **On Condition** field

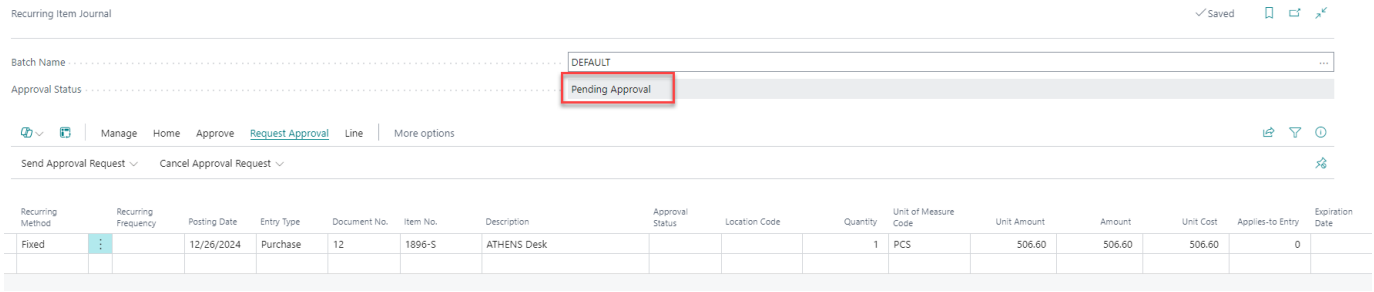
A new window will open with all fields from the **Item Journal Batch** table. Here, we will specify that we want our workflow to work only for journals with specific criteria. For example, we can set filters so that the workflow is only activated when Template Name = **'ITEM'** and Batch Name = **'DEFAULT'**.



> **① Note**
>
> For the **Item Journal Line Approval Workflow**, you can define filters on any field from the **Item Journal Line** table to determine when the workflow should be triggered.

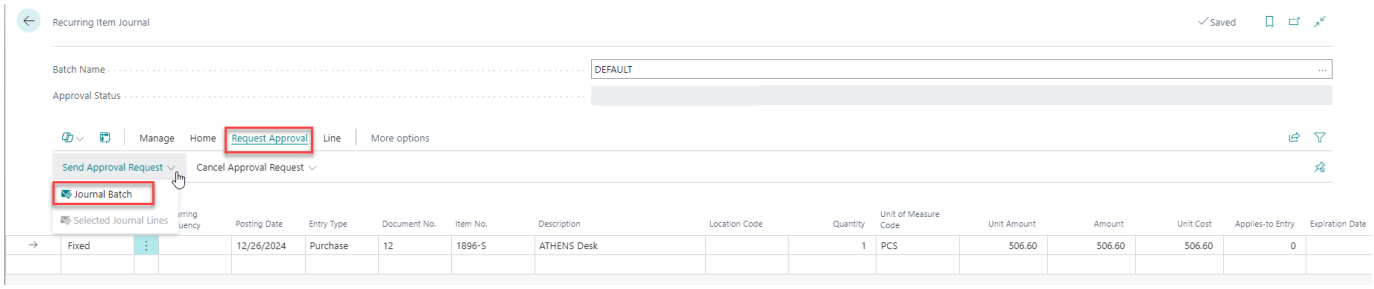
II. ITEM JOURNAL BATCH APPROVAL WORKFLOW

When using the **Item Journal Batch Approval Workflow**: The **Approval Status** field appears below the **Batch Name**.



1. Sending Approval Request for Journal Batch

To send the approval request, click on **Send Approval Request** => **Journal Batch**

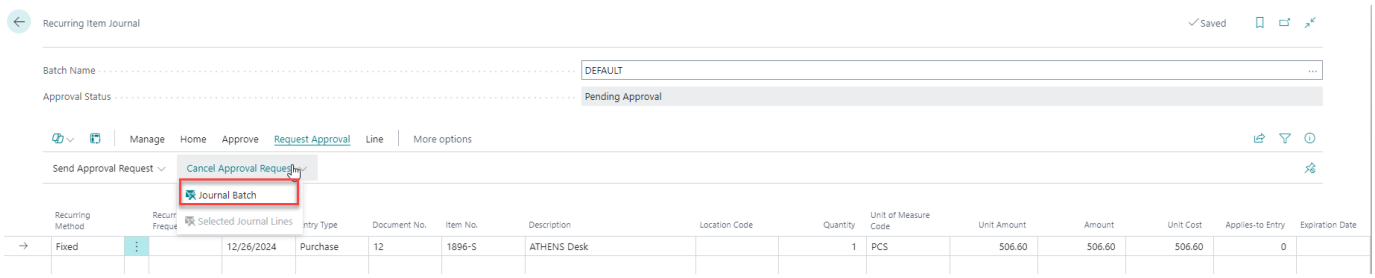


When the user clicks on **Journal Batch**, the system initiates the approval process by:

- Sending an approval request
- Restrict the journal from being modified
- Changing the status to "Pending Approval"

2. Cancel Approval Request for Journal Batch

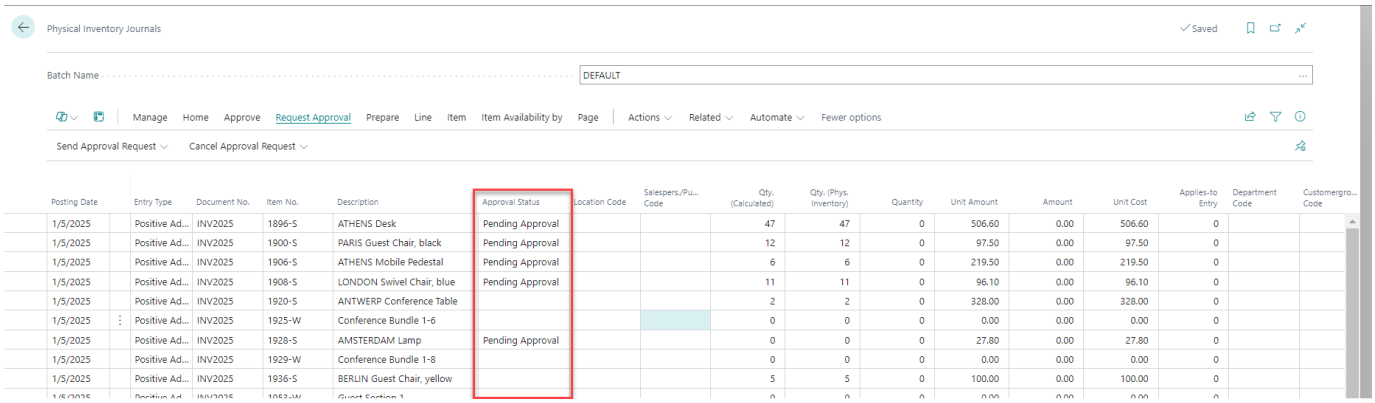
To cancel approval request, click on **Cancel Approval Request** => **Journal Batch**



When the user clicks on **Journal Batch**, the system will cancel approval request, remove the restriction and the status of the document will change to **Canceled.**

III. ITEM JOURNAL LINE APPROVAL WORKFLOW

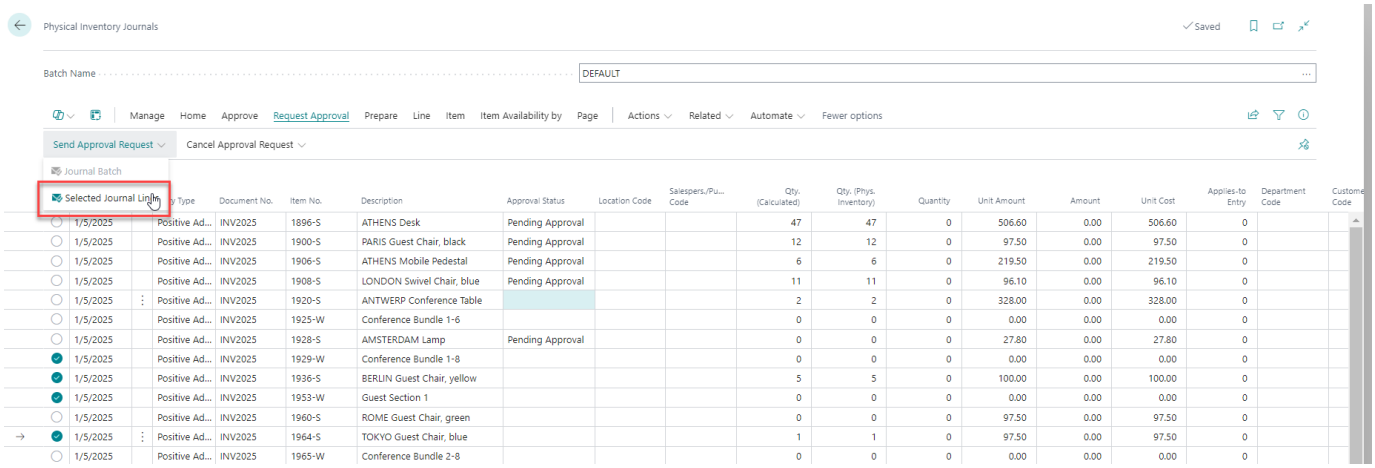
When using the **Item Journal Line Approval Workflow**: The **Approval Status** field is displayed on the line.



1. Sending Approval Request for Journal Line

To send the approval request, click on **Send Approval Request** => **Selected Journal Line**

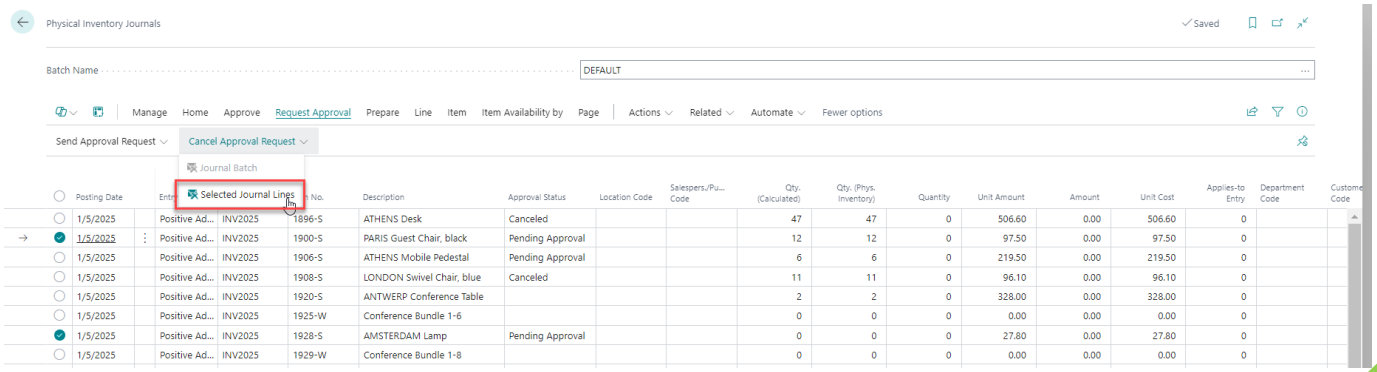
Only Selected lines will be sent for approval



2. Cancel Approval Request for Journal Line

To cancel approval request, click on **Cancel Approval Request** => **Selected Journal Line**

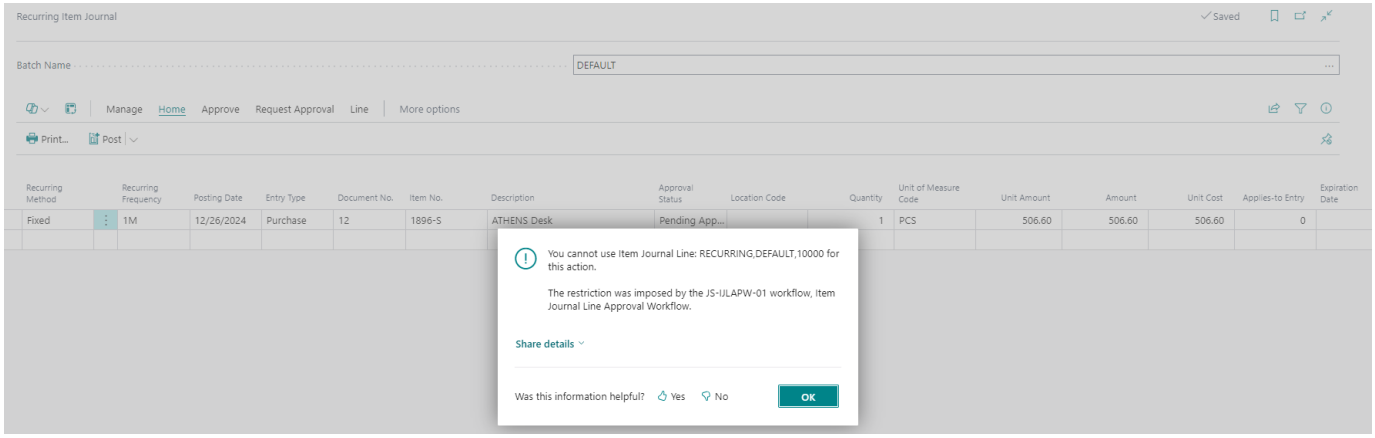
Similarly, when canceling an approval request, only the selected lines will be affected.



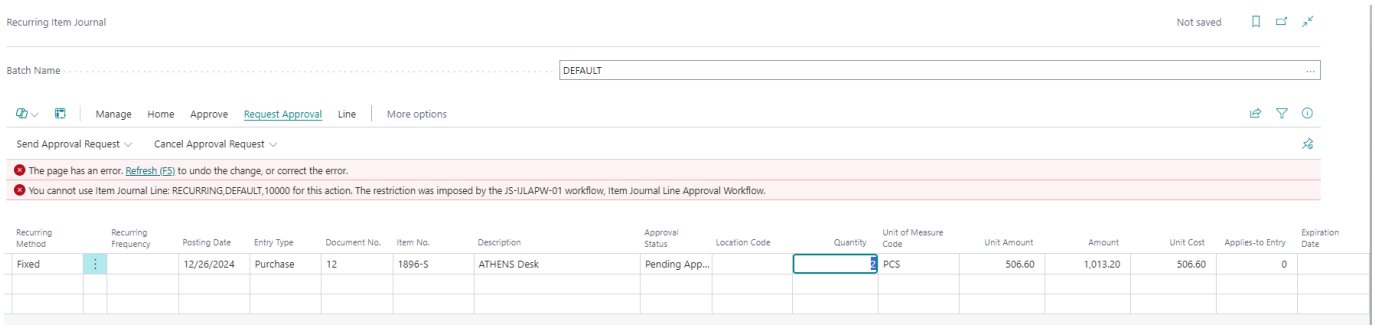
IV. RULES AND CONTROLS FOR JOURNAL WITH ACTIVE APPROVAL WORKFLOW

When the approval workflow is enabled (either by batch or by line), specific controls are implemented to determine whether posting a journal is authorized or blocked. These controls ensure compliance with the defined approval rules and maintain the integrity of the process.

- The restriction applies when adding or modifying a line in the journal.
- Once approved, the restriction is automatically removed.
- Posting a journal is not allowed until it has been approved.



- A line cannot be modified if an approval request is pending (the approval request must be canceled beforehand).



- Any modification to an already approved line reactivates the restriction, requiring a new approval request.