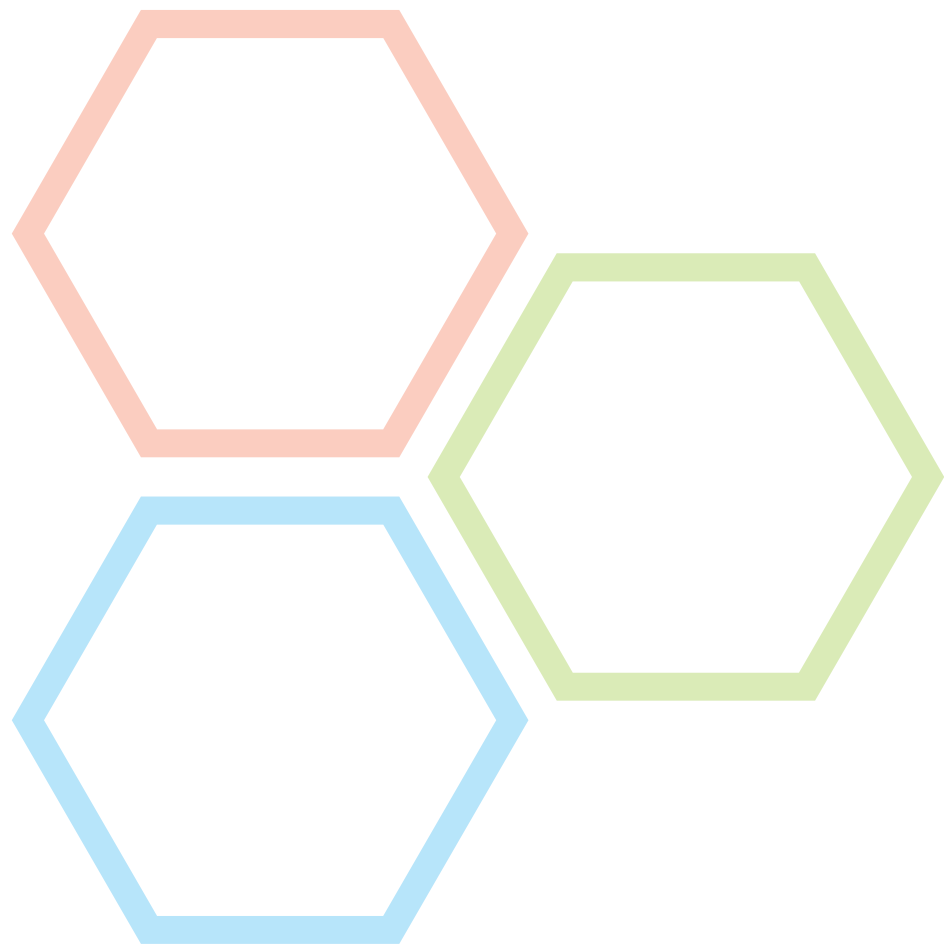


# ITEM JOURNAL APPROVAL WORKFLOW

*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

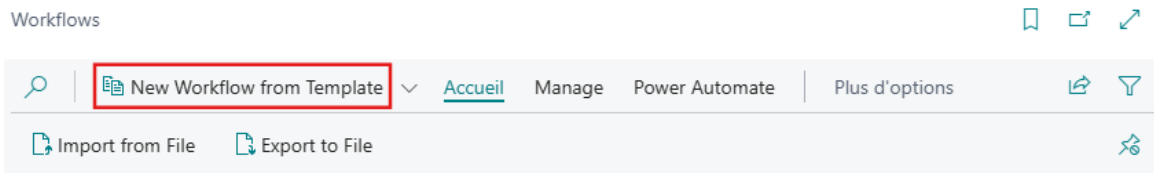
By automating the approval process, workflows help ensure that the process is consistent, efficient, and transparent. They also provide a clear audit trail of who approved what and when, which can be valuable for compliance purposes.

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.

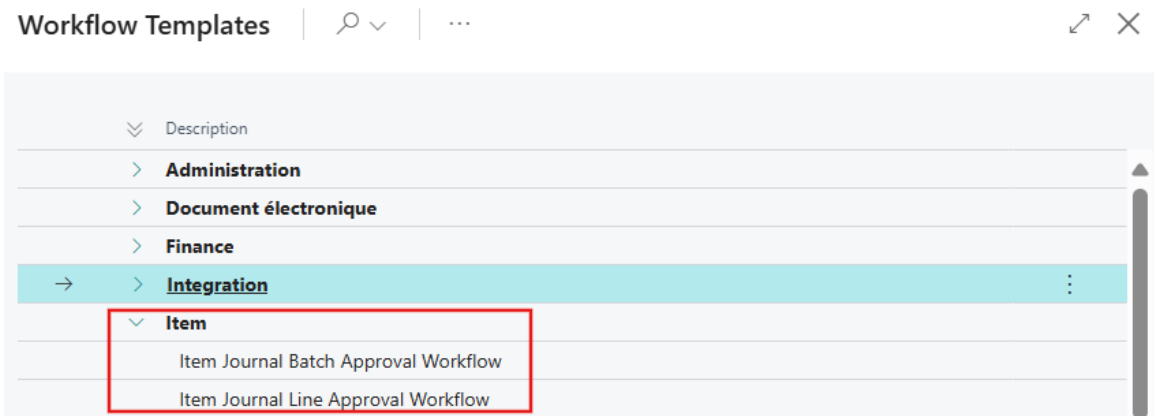
You can set up a new workflow in the **Workflows** list for the **Item Journal Batch Approval Workflow** or the **Item Journal Line Approval Workflow**.

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**

Workflow ✓ Enregistré

## JS-IJBAPW-01 · Item Journal Batch Approval Workflow

Import from File Export to File Workflow Step Instances Archived Workflow Step Instances

Code: JS-IJBAPW-01  
 Description: Item Journal Batch Approval Workflow  
 Category: ITEM  
 Enabled:

Workflow Steps | Decrease Indent Increase Indent Delete Event Conditions

When Event	On Condition	Then Response
→ Approval of a item journal batch is requested.	(View filter details)	(+) Add record restriction.
An approval request is approved.	Pending Approvals: 0	Remove record restriction.
An approval request is approved.	Pending Approvals: >0	Send approval request for the rec
An approval request is rejected.	<Always>	Reject the approval request for th
An approval request for a item journal batch is ...	<Always>	(+) Cancel the approval request fo
An approval request is delegated.	<Always>	Send approval request for the rec

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

When Event	On Condition	Then Response
→ Approval of a item journal batch is requested.	<Always>	(+) Add record restriction.

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'**.

Event Conditions - Approval of a item journal bat... ↗ ✕

Filter: Item Journal Batch

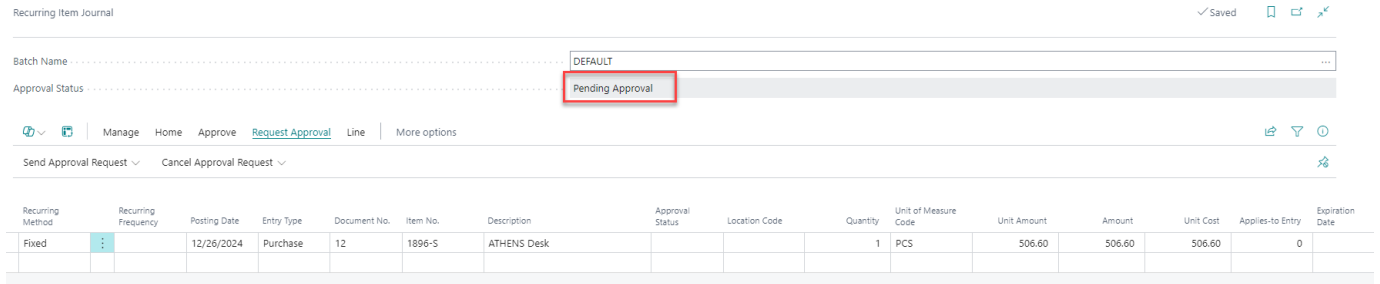
× Journal Template Name: ITEM  
 × Name: DEFAULT  
 + Filter...

**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**.



Recurring Item Journal ✓ Saved

Batch Name: DEFAULT

Approval Status: Pending Approval

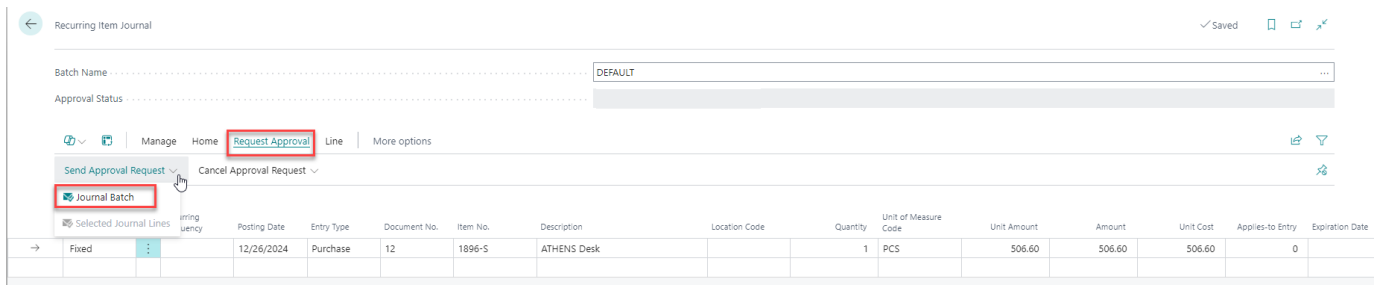
Manage Home Approve **Request Approval** Line More options

Send Approval Request Cancel Approval Request

Recurring Method	Recurring Frequency	Posting Date	Entry Type	Document No.	Item No.	Description	Approval Status	Location Code	Quantity	Unit of Measure Code	Unit Amount	Amount	Unit Cost	Applies-to Entry	Expiration Date
Fixed	:	12/26/2024	Purchase	12	1896-S	ATHENS Desk			1	PCS	506.60	506.60	506.60	0	

### 1. Sending Approval Request for Journal Batch

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



Recurring Item Journal ✓ Saved

Batch Name: DEFAULT

Approval Status:

Manage Home Approve **Request Approval** Line More options

Send Approval Request **Journal Batch** Cancel Approval Request

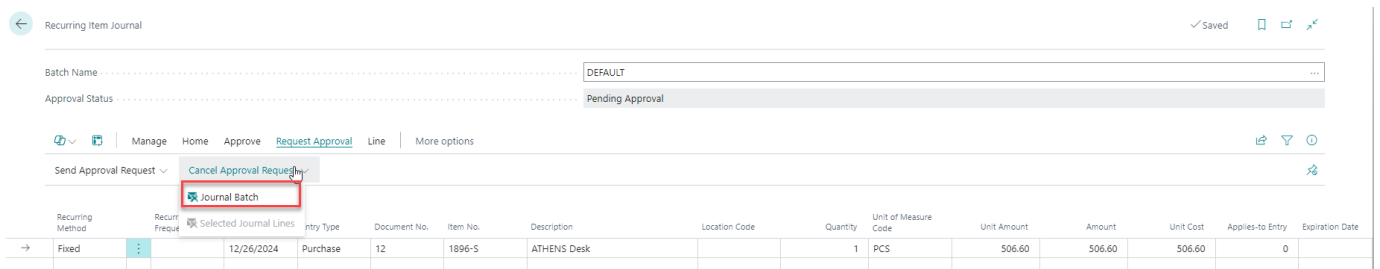
Recurring Method	Recurring Frequency	Posting Date	Entry Type	Document No.	Item No.	Description	Approval Status	Location Code	Quantity	Unit of Measure Code	Unit Amount	Amount	Unit Cost	Applies-to Entry	Expiration Date
Fixed	:	12/26/2024	Purchase	12	1896-S	ATHENS Desk			1	PCS	506.60	506.60	506.60	0	

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**



Recurring Item Journal ✓ Saved

Batch Name: DEFAULT

Approval Status: Pending Approval

Manage Home Approve **Request Approval** Line More options

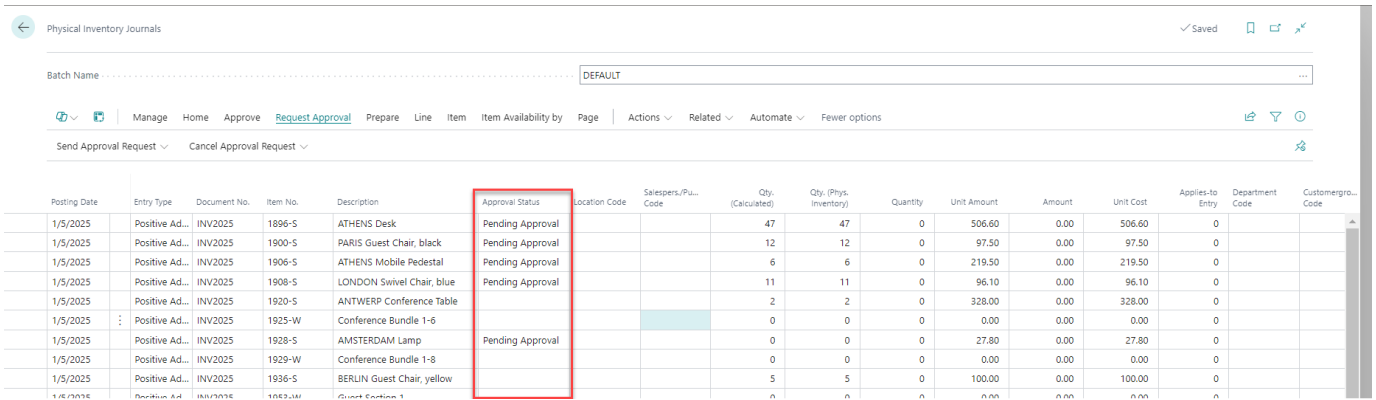
Send Approval Request **Journal Batch** Cancel Approval Request

Recurring Method	Recurring Frequency	Posting Date	Entry Type	Document No.	Item No.	Description	Approval Status	Location Code	Quantity	Unit of Measure Code	Unit Amount	Amount	Unit Cost	Applies-to Entry	Expiration Date
Fixed	:	12/26/2024	Purchase	12	1896-S	ATHENS Desk			1	PCS	506.60	506.60	506.60	0	

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.

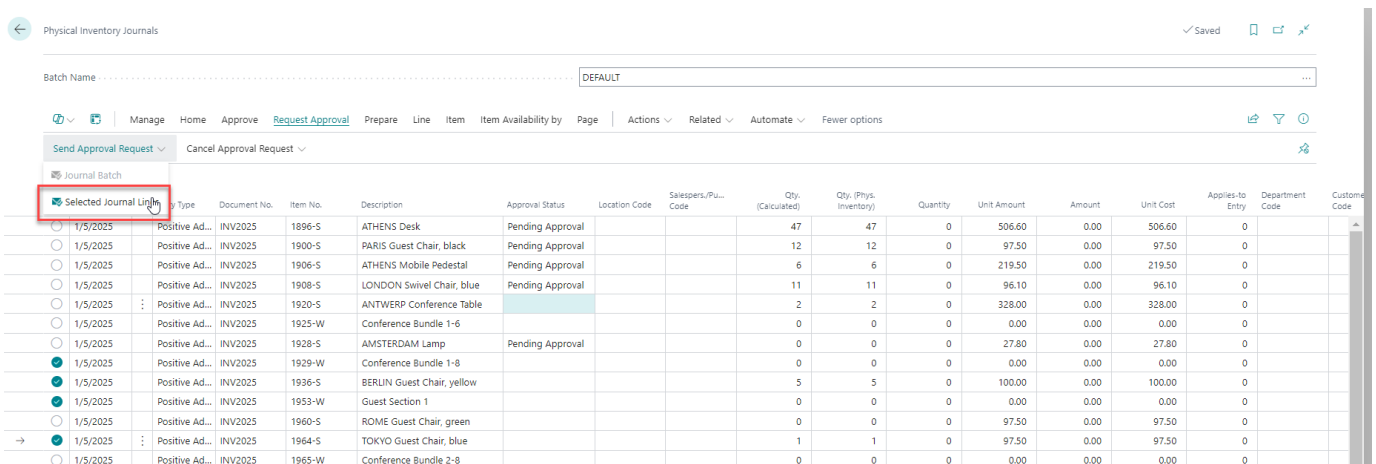


Posting Date	Entry Type	Document No.	Item No.	Description	Approval Status	Location Code	Salespers./Pu... Code	Qty. (Calculated)	Qty. (Phys. Inventory)	Quantity	Unit Amount	Amount	Unit Cost	Applies-to Entry	Department Code	Customergr... Code
1/5/2025	Positive Ad...	INV2025	1896-S	ATHENS Desk	Pending Approval			47	47	0	506.60	0.00	506.60	0		
1/5/2025	Positive Ad...	INV2025	1900-S	PARIS Guest Chair, black	Pending Approval			12	12	0	97.50	0.00	97.50	0		
1/5/2025	Positive Ad...	INV2025	1906-S	ATHENS Mobile Pedestal	Pending Approval			6	6	0	219.50	0.00	219.50	0		
1/5/2025	Positive Ad...	INV2025	1908-S	LONDON Swivel Chair, blue	Pending Approval			11	11	0	96.10	0.00	96.10	0		
1/5/2025	Positive Ad...	INV2025	1920-S	ANTWERP Conference Table				2	2	0	328.00	0.00	328.00	0		
1/5/2025	Positive Ad...	INV2025	1925-W	Conference Bundle 1-6				0	0	0	0.00	0.00	0.00	0		
1/5/2025	Positive Ad...	INV2025	1928-S	AMSTERDAM Lamp	Pending Approval			0	0	0	27.80	0.00	27.80	0		
1/5/2025	Positive Ad...	INV2025	1929-W	Conference Bundle 1-8				0	0	0	0.00	0.00	0.00	0		
1/5/2025	Positive Ad...	INV2025	1936-S	BERLIN Guest Chair, yellow				5	5	0	100.00	0.00	100.00	0		
1/5/2025	Positive Ad...	INV2025	1953-W	Guest Section 1				0	0	0	0.00	0.00	0.00	0		

#### 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**

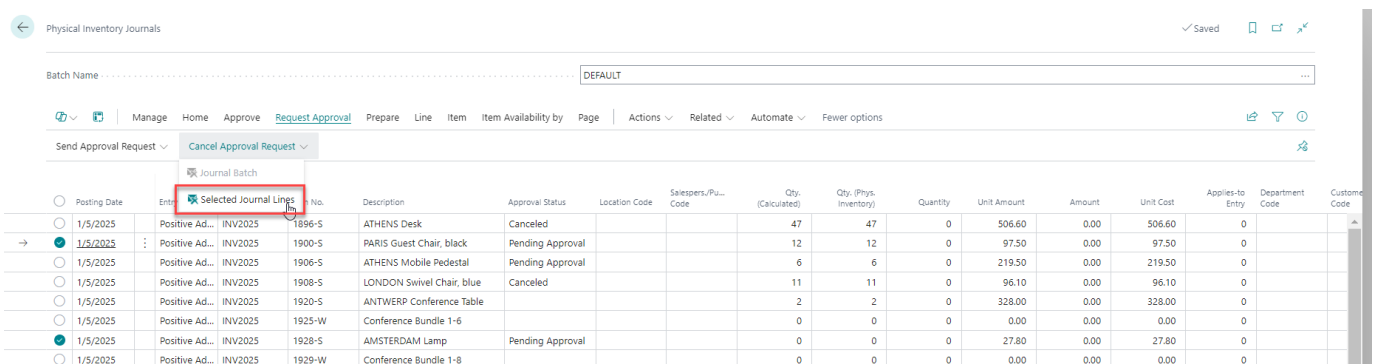


Posting Date	Entry Type	Document No.	Item No.	Description	Approval Status	Location Code	Salespers./Pu... Code	Qty. (Calculated)	Qty. (Phys. Inventory)	Quantity	Unit Amount	Amount	Unit Cost	Applies-to Entry	Department Code	Customergr... Code
1/5/2025	Positive Ad...	INV2025	1896-S	ATHENS Desk	Pending Approval			47	47	0	506.60	0.00	506.60	0		
1/5/2025	Positive Ad...	INV2025	1900-S	PARIS Guest Chair, black	Pending Approval			12	12	0	97.50	0.00	97.50	0		
1/5/2025	Positive Ad...	INV2025	1906-S	ATHENS Mobile Pedestal	Pending Approval			6	6	0	219.50	0.00	219.50	0		
1/5/2025	Positive Ad...	INV2025	1908-S	LONDON Swivel Chair, blue	Pending Approval			11	11	0	96.10	0.00	96.10	0		
1/5/2025	Positive Ad...	INV2025	1920-S	ANTWERP Conference Table				2	2	0	328.00	0.00	328.00	0		
1/5/2025	Positive Ad...	INV2025	1925-W	Conference Bundle 1-6				0	0	0	0.00	0.00	0.00	0		
1/5/2025	Positive Ad...	INV2025	1928-S	AMSTERDAM Lamp	Pending Approval			0	0	0	27.80	0.00	27.80	0		
1/5/2025	Positive Ad...	INV2025	1929-W	Conference Bundle 1-8				0	0	0	0.00	0.00	0.00	0		
1/5/2025	Positive Ad...	INV2025	1936-S	BERLIN Guest Chair, yellow				5	5	0	100.00	0.00	100.00	0		
1/5/2025	Positive Ad...	INV2025	1953-W	Guest Section 1				0	0	0	0.00	0.00	0.00	0		
1/5/2025	Positive Ad...	INV2025	1960-S	ROME Guest Chair, green				0	0	0	97.50	0.00	97.50	0		
1/5/2025	Positive Ad...	INV2025	1964-S	TOKYO Guest Chair, blue				1	1	0	97.50	0.00	97.50	0		
1/5/2025	Positive Ad...	INV2025	1965-W	Conference Bundle 2-8				0	0	0	0.00	0.00	0.00	0		

#### 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.**



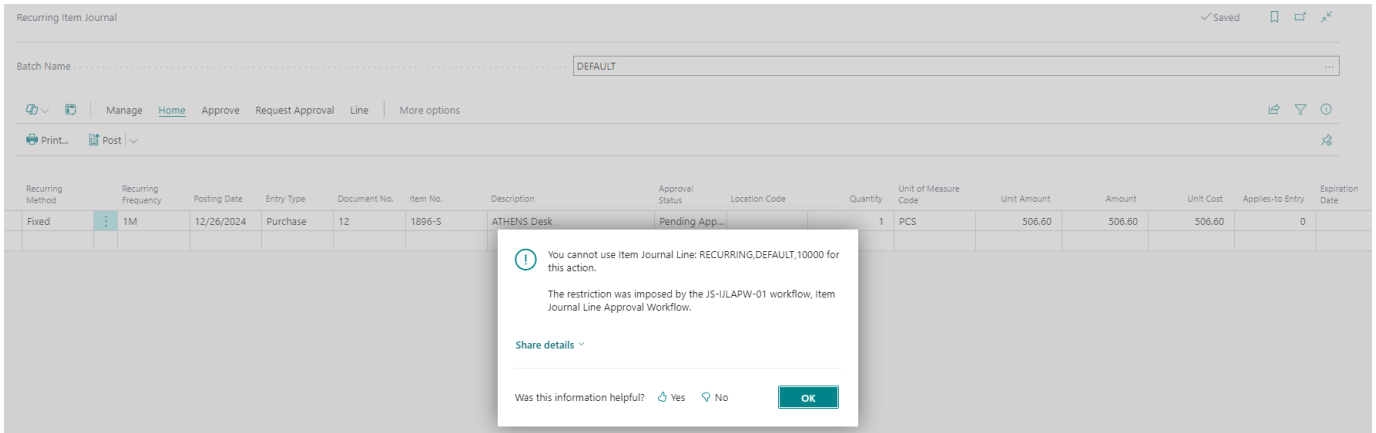
Posting Date	Entry Type	Document No.	Item No.	Description	Approval Status	Location Code	Salespers./Pu... Code	Qty. (Calculated)	Qty. (Phys. Inventory)	Quantity	Unit Amount	Amount	Unit Cost	Applies-to Entry	Department Code	Customergr... Code
1/5/2025	Positive Ad...	INV2025	1896-S	ATHENS Desk	Cancelled			47	47	0	506.60	0.00	506.60	0		
1/5/2025	Positive Ad...	INV2025	1900-S	PARIS Guest Chair, black	Pending Approval			12	12	0	97.50	0.00	97.50	0		
1/5/2025	Positive Ad...	INV2025	1906-S	ATHENS Mobile Pedestal	Pending Approval			6	6	0	219.50	0.00	219.50	0		
1/5/2025	Positive Ad...	INV2025	1908-S	LONDON Swivel Chair, blue	Cancelled			11	11	0	96.10	0.00	96.10	0		
1/5/2025	Positive Ad...	INV2025	1920-S	ANTWERP Conference Table				2	2	0	328.00	0.00	328.00	0		
1/5/2025	Positive Ad...	INV2025	1925-W	Conference Bundle 1-6				0	0	0	0.00	0.00	0.00	0		
1/5/2025	Positive Ad...	INV2025	1928-S	AMSTERDAM Lamp	Pending Approval			0	0	0	27.80	0.00	27.80	0		
1/5/2025	Positive Ad...	INV2025	1929-W	Conference Bundle 1-8				0	0	0	0.00	0.00	0.00	0		



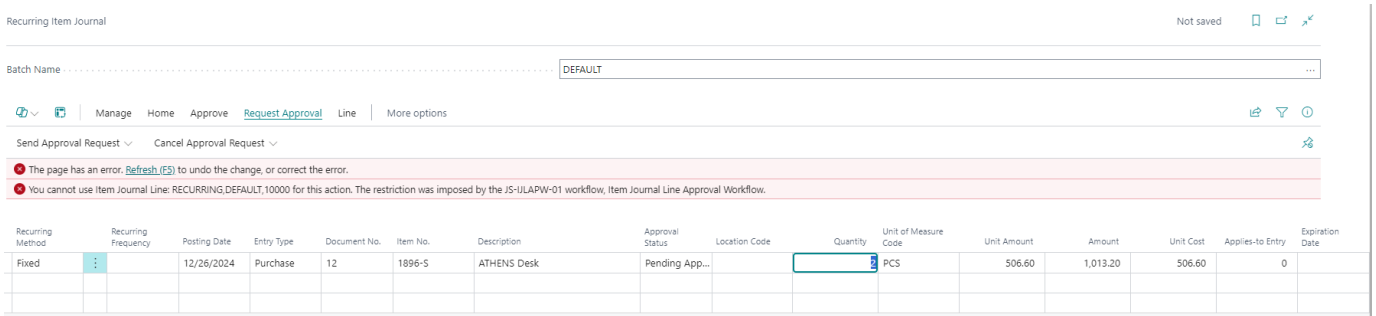
#### IV. RULES AND CONTROLS FOR JOURNAL WITH ACTIVE APPROVAL WORKFLOW

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.