COSMO REGULATORY AFFAIRS

Online Help PDF

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COSMO Regulatory Affairs

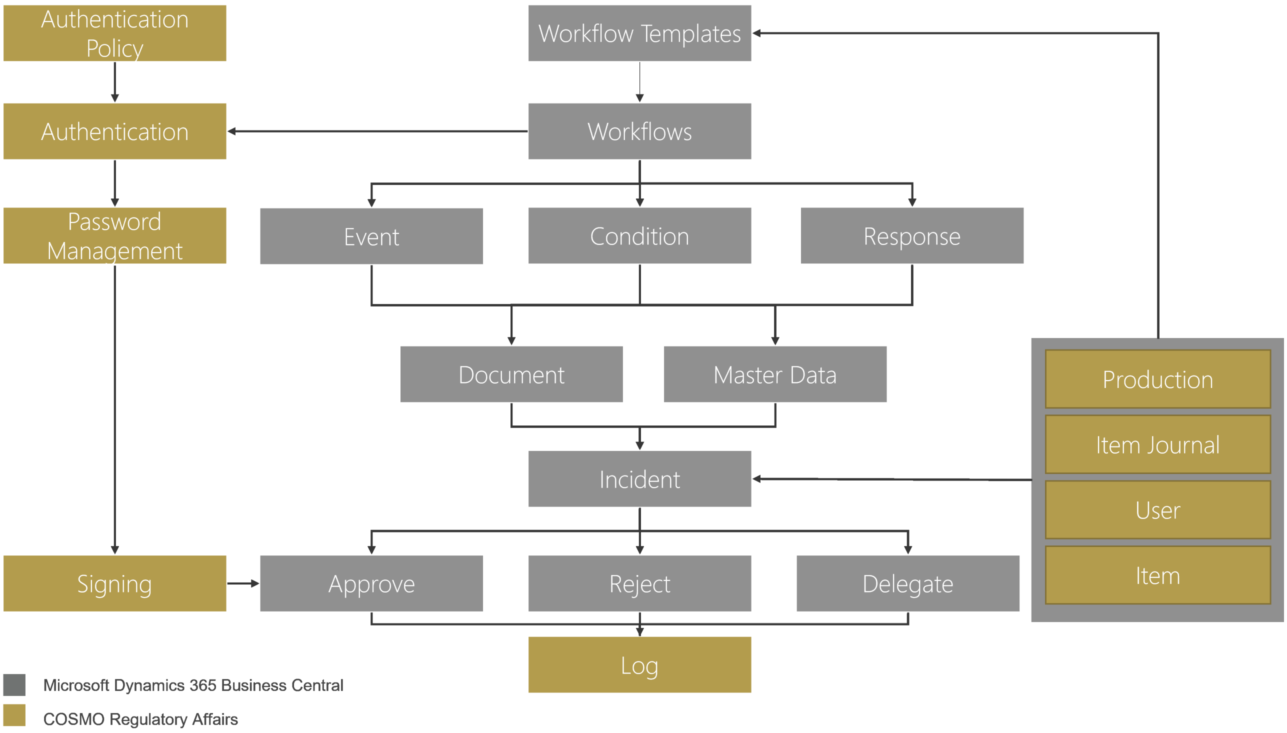
Cosmo Regulatory Affairs provides workflows to ensure that processes in Microsoft Dynamics 365 Business Central comply with industry-specific regulations. It extends workflow functionalities by the ability to track, verify, and audit transactions.

COSMO Regulatory Affairs uses the base functionality of workflows to provide templates for manufacturing processes, such as approvals for certifying production BOMs and routings as well as changes to production order components and routing lines, and other critical processes, such as item blocking and posting inventory and manufacturing journals. An additional Single-Factor Authentication (SFA) next to the usual user log-in provides an optional high-security level.

Key Features

- Workflow templates for manufacturing:
  - Certifying production BOMs and production BOM versions
  - Certifying routing headers and routing header versions
  - Changes to production order components, including insertion and deletion
  - Changes to production order routing lines, including insertion and deletion
- Workflow templates for other critical processes:
  - Blocking and unblocking an item
  - Posting journals:
    - Inventory (Item, Recurring Item, Revaluation, Physical Inventory, Item Reclassification)
    - Manufacturing (Output, Consumption, Recurring Output, Recurring Consumption, Production)
- Workflow templates for workflow-related changes:
  - Changing steps, step arguments, and rules in existing workflows
  - Changing settings in User Card and resetting user workflow passwords
- Additional security using Single-Factor Authentication (SFA)
- Recommend or require comments when requesting, cancelling, approving, rejecting, or delegating approval requests.
- Asynchronous workflow templates for allowing limited license users to approve requests to certify production BOMs/production BOM versions and routing headers/routing header versions

COSMO Regulatory Affairs contains an extensive structure of many connected components, as the following graphic illustrates.



Access COSMO Regulatory functionality using the Tell Me feature in Microsoft Dynamics 365 Business Central. Choose the 🔍 icon, enter the page name, and then choose the related link.

> **Note**
> **This content does not describe standard setup and usage processes for Workflows. For complete information about setting up and using Workflows, refer to [Workflows in Dynamics 365 Business Central](#) in Microsoft Dynamics 365 Business Central Help.**

> **Note**
> **The content in COSMO Docs reflects the most current version of the COSMO Regulatory Affairs app. If your company is using a different version, you may not have some of the described features. If you are using an older version or an On-Premises version of the app, see the specific product content in [COSMO CONSULT Product Documentation](#).**

Feedback

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Getting Started

This section covers the app installation, licensing, registration, and activation processes required to use COSMO Regulatory Affairs. Additionally, the role center that provides the most efficient user experience is described as well as the setup checklist/wizard, which guides you through the general setup of the app.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Install COSMO Regulatory Affairs in a SaaS or OnPremises environment.	App Installation
License and register COSMO Regulatory Affairs.	App Licensing and Registration
Use a setup checklist/wizard to define the basic settings for COSMO Regulatory Affairs.	Assisted Setup
Make pages and controls visible for the app.	App Activation
Learn about the role center that can be assigned to users to provide the most efficient COSMO Regulatory Affairs user experience.	Role Center

Feedback

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App Installation

This section covers the installation of the COSMO Regulatory Affairs app. Typically an installation is only performed once by an administrator and is not executed by the user. The installation differs for SaaS and On-Premises (OnPrem) environments.

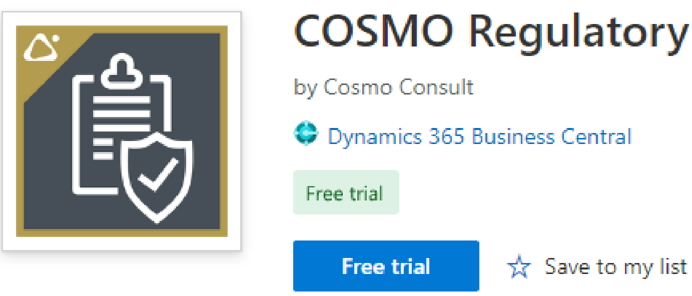
To install in SaaS environment

In SaaS environments, the app can be installed from the AppSource. There are two ways to install the app: externally or internally from Business Central. All dependencies are installed automatically.

Depending on the current Microsoft upgrade policy, you may not have the most current version of the app. To upgrade to the most current version, go to the Dynamics 365 Business Central admin center and perform the app upgrade for your environment.

AppSource

Visit the AppSource and then choose Free trial. You will be forwarded to a page where you must log in with your Business Central user credentials and select an environment to install the app to. Follow the wizard instructions to complete the installation.



Extension Marketplace

In Business Central, choose the icon, enter Extension Marketplace, and then choose the related link. In the marketplace, search for COSMO Regulatory Affairs and then choose Free Trial. Follow the wizard instructions to complete the installation.

To install in on-premises environment

To install the COSMO Regulatory Affairs app and its requirements in an on-premises environment, you can find the app files in the COSMO CONSULT Solution Portal. Check the technical specifications of each version to find the minimum dependent version of *Business Central* and the *Base Application*. For customer installations without a Business Central developer license, you must create and install a runtime package of the app (Microsoft Documentation).

Besides the Business Central Base Application, the app depends on additional apps that must be installed in the correct order first.

1. COSMO Licensing app
2. COSMO Regulatory Affairs app

See Also

App Licensing and Registration
Assisted Setup
App Activation
Role Center

Feedback

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App Licensing and Registration

This section covers the licensing, registration, and license check of the COSMO Regulatory Affairs app. When installing the app, COSMO Licensing is automatically installed. After installing the app, you need to register it either with a license activation code or a trial license.

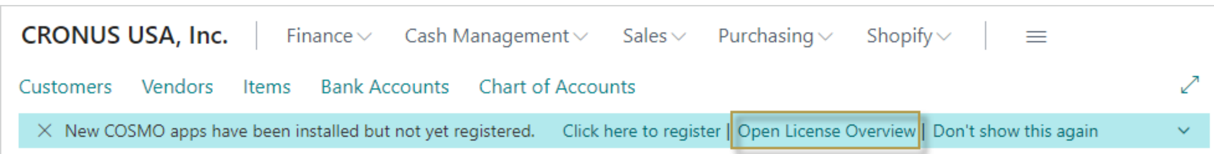
> **Note**
>
> **App registration by activation code is available if COSMO Licensing version 2.2 or higher is installed. Customers who purchase new COSMO product subscriptions through our Marketplace will receive an activation code.**
> **If you do not have the option to enter an activation code or have not received an activation code, follow the steps in the Register the app with a trial license section.**
> **After you have registered, you can contact appsource@cosmoconsult.com to convert your 30-day trial license to a full license.**

To assign licensing permission set

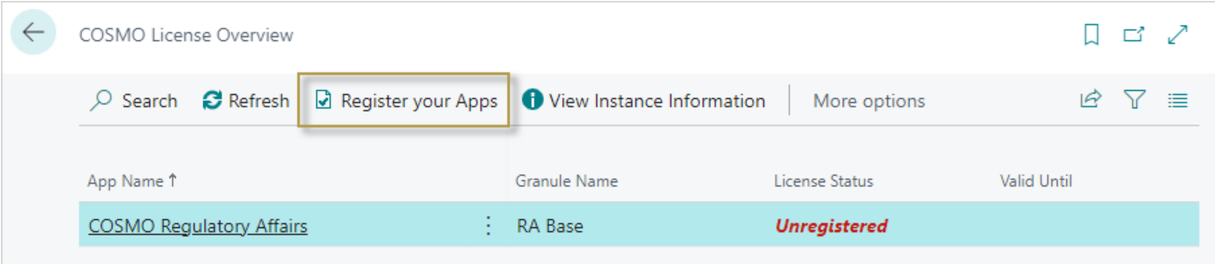
The COSMO Licensing app provides an extension permission set with Role ID = *CCS LIC ALL*. This permission set must be assigned to all users in the database to allow access to the COSMO License Overview page and, more importantly, to the licensed COSMO CONSULT apps. App-specific permission set(s) must be assigned to users in the database to allow access to the licensed functionality.

To open the COSMO License Overview

1. If the registration notification does not show in the notification bar, refresh the environment.



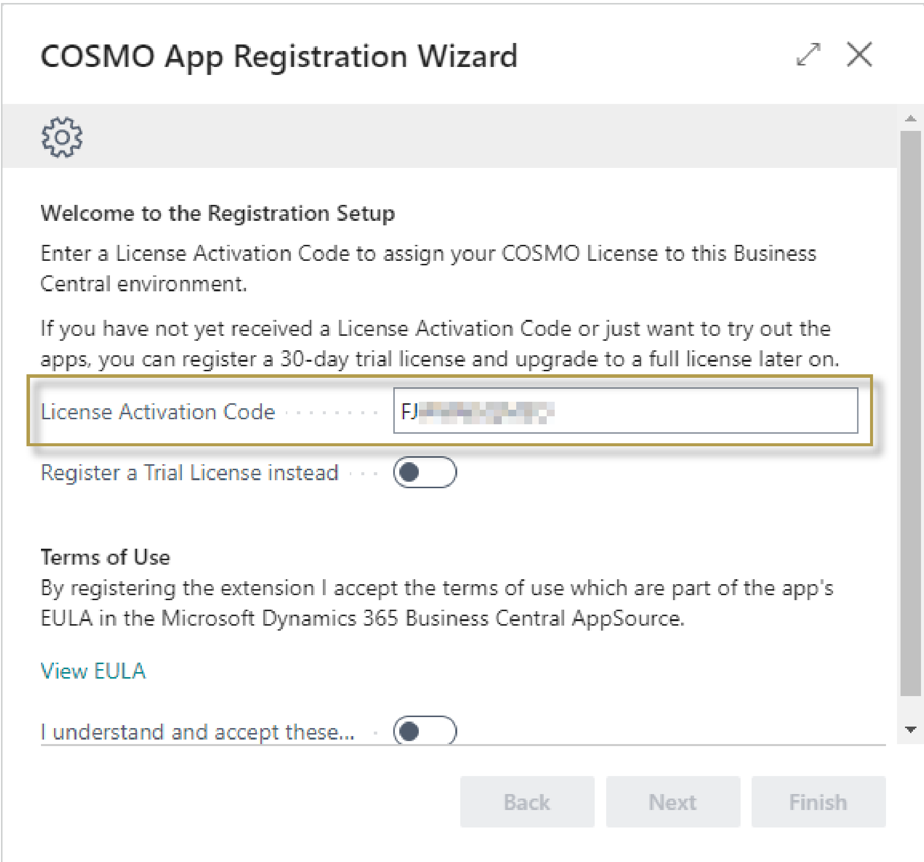
2. On the notification line, choose Open License Overview.
The app is listed in the COSMO License Overview page with Status = *Unregistered*.



3. Choose the Register your Apps action.
   The COSMO App Registration Wizard opens with the registration options.

To register the app with license activation code

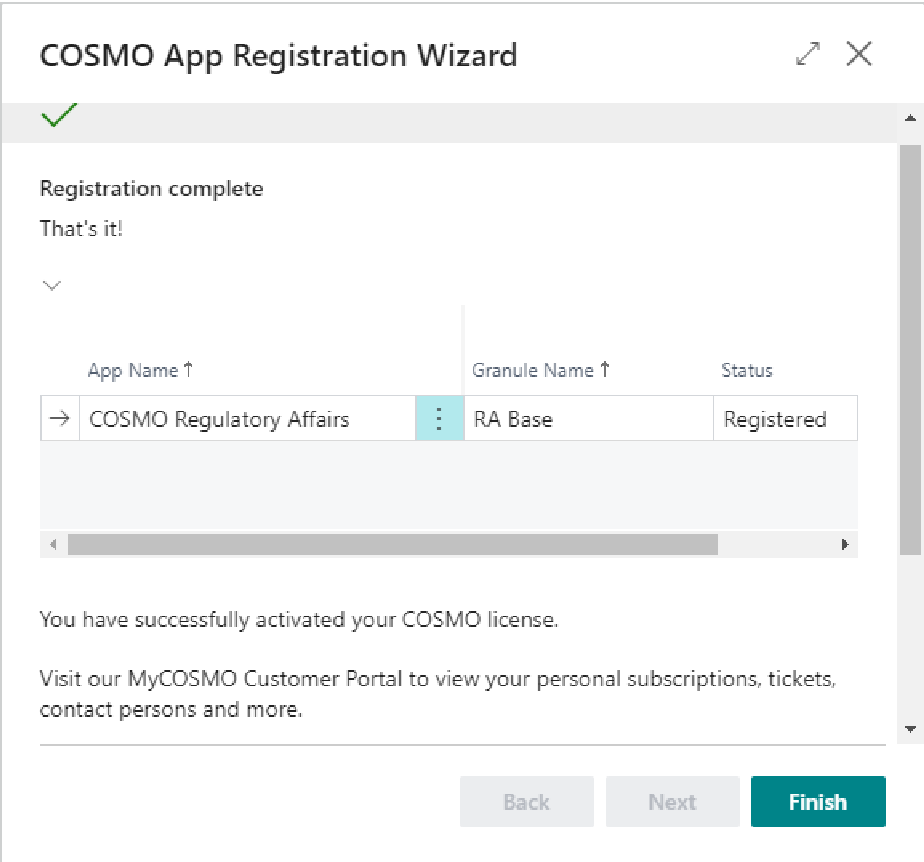
1. If you purchased the Business Central app through our Marketplace, you will have received an activation code by email.
   Enter this activation code in the License Activation Code field on the first page of the COSMO App Registration Wizard.



> **Note**
> **In SaaS environments, an activation code can be used for exactly one production system. The same activation code can additionally be used in multiple SaaS environments (sandbox environments, e.g., test/demo/development environments).**

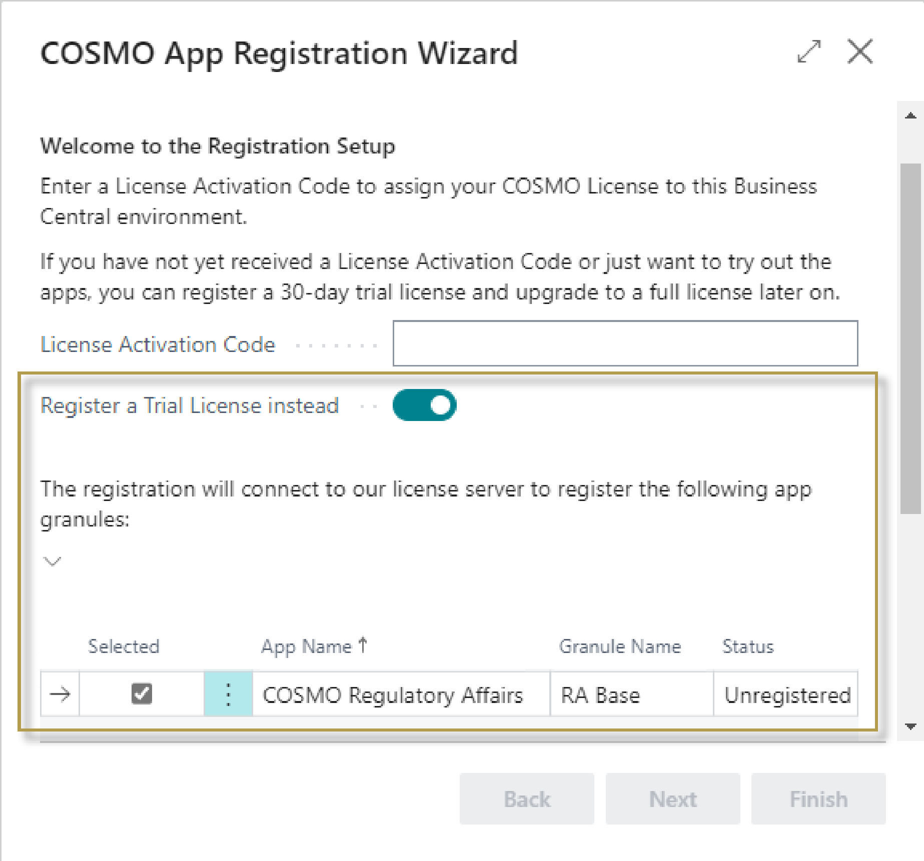
> **For On-premises, there is no technical distinction between *Production* and *Sandbox*, so the activation code is instead connected to the serial number of the Business Central license (.flf / .bclicense) with which it was first activated. Therefore, it is possible to use it On-premises multiple times with the same Business Central license (to allow use in test/demo/development environments). Once it has been redeemed, it cannot be used in BC environments with another BC license.**

2. In order to agree to the Terms of Use, scroll down, turn on the I understand and accept these terms toggle, and then choose the Next button.
3. You have successfully registered your app. Choose the Finish button to close the wizard.
   The license connected to the entered activation code will then be automatically retrieved.



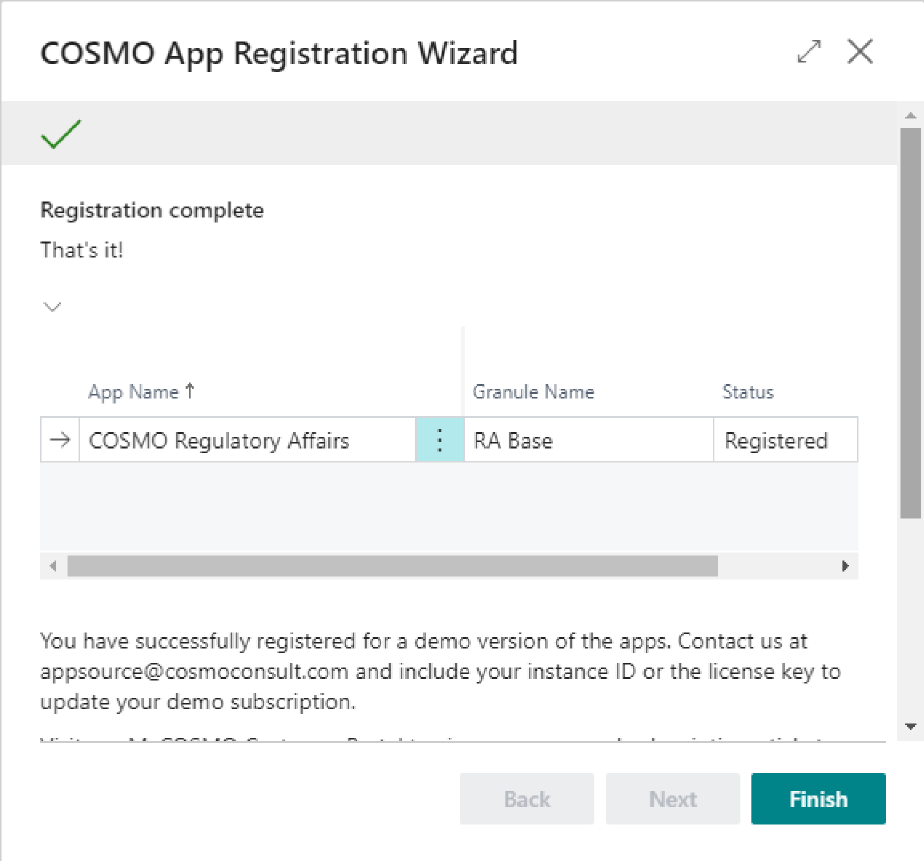
To register the app with a trial license

1. If you turn on the Register a Trial License instead toggle on the first page of the COSMO App Registration Wizard, the app granule to be registered is displayed.



2. In order to agree to the Terms of Use, scroll down, turn on the I understand and accept these terms toggle, and then choose the Next button.
3. Enter your customer name. The name is used to identify the company. For test purposes, enter any Cronus-related name.
4. Choose the Next button to sign into the COSMO Platform to link the registration with your account. The COSMO Platform opens in a new browser tab. After signing in you can close this tab and return to the final page of the COSMO App Registration Wizard.

   To skip this step, choose the Skip Login button.
5. You have successfully registered for a 30-day trial version of the app. Contact appsource@cosmoconsult.com and use the displayed license key to update your trial subscription.
6. The app has Status = *Registered*. Choose the Finish button to close the wizard.



7. The status for the app is updated in the COSMO License Overview page. Leave the COSMO License Overview page to return to the Role Center.

> **Note**
> **You can register the app and perform other administrative licensing tasks from the COSMO License Overview page.**

To check the license

The COSMO License Overview page lists the license status of the COSMO app and is accessed using the Tell Me feature.

1. Choose the icon, enter COSMO License Overview, and then choose the related link. This page can also be opened from the last page of the COSMO App Registration Wizard by choosing Open License Overview.
2. In the COSMO License Overview page, the app can be registered if not done on the Role Center notification bar. Other administrative tools are available as well.
3. Hover over an action on the COSMO License Overview page to read a short description.

See Also

App Installation
Assisted Setup
App Activation
Role Center
Regulatory Affairs Setup

Feedback

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Assisted Setup

In Microsoft Business Central, guided experiences are interactive wizards that assist users in completing specific tasks within the software. These guides take users through the process step-by-step, offering instructions and prompts along the way. The COSMO Regulatory Affairs wizard is designed to make it easy for you to set up this extension, even if you have little or no experience with the software.

Set Role

To configure COSMO Regulatory Affairs in Business Central, you must assign the *Compliance Manager* role in My Settings first.

1. Choose the icon and then select My Settings from the menu. Alternatively, you can use the Tell Me feature.
2. In the Role field, choose the ellipsis button.
3. In the Available Roles page, select *Compliance Manager* and then choose the OK button.
4. Choose the OK button to close the My Settings page and save your changes.

Open Get Started Checklist

To start working with the checklist, choose the Show demo tours or Start button in the Get started part in the Role Center.

The checklist will guide you through the process of setting up the COSMO Regulatory Affairs functionality, including base settings for COSMO Regulatory Affairs, configurations for approval users, passwords, workflow user groups, and then the creation of the workflows. By following the prompts and instructions provided by the wizard, you can easily set up and customize COSMO Regulatory Affairs to fit your specific needs.

You are able to skip any steps that you are not ready to complete by choosing Skip for now and then can revisit these steps later (see Reopen Closed Checklist).

Unless you have skipped a step, you must select the Mark as completed checkbox to move to the next step.

COSMO App Licensing and Registration

To use the COSMO Regulatory Affairs app, licensing and registration is required.

1. If the app has not been licensed and registered yet, choose the Start button in the

COSMO app registration step.

The wizard opens the COSMO License Overview page, listing the apps that need to be registered using either a license activation code or a trial license. You must agree to the terms of use and then follow the prompts. If using a trial license, enter your customer name to identify your company and then sign into the COSMO Platform to link the registration to your account or you can choose to skip this step. Once registration is complete, you will have successfully registered for a fully licensed version or 30-day demo version of the apps. To update your demo subscription, use the displayed license key. After registration, the apps will be marked as *Registered*.

> **Note**
> **If the app was already licensed and registered, choosing the Start button opens the COSMO License Overview page, listing the apps that were/were not registered.**

2. Choose the Close button and then choose the Mark as completed checkbox to move to the next step of the checklist.

Regulatory Affairs Setup

The Regulatory Affairs setup step will guide you through the basic setup of the COSMO Regulatory Affairs functionality using the Assisted Setup wizard. Any of the setting changes made using the wizard can be restored to default settings and/or changed later in the Regulatory Affairs Setup page.

1. Choose the Start button to open the Regulatory Affairs Setup wizard.
2. Choose the Next button to move to the password requirements.
3. Hover over a field to view an explanation of the setting. Make any changes as needed.
4. Choose the Next button to move to the password behaviors.
5. Hover over a field to view an explanation of the setting. Make any changes as needed.
6. Choose the Next button to move to the setting for deactivating the standard Approval Administrator permission.
7. Hover over the field to view an explanation of the setting. Update as needed.
8. Choose the Next button and then choose the Finish button to close the wizard.
9. Choose the Mark as completed checkbox to proceed to the next step of the checklist.

Approval User Setup

The Approval User Setup step guides you through defining the users who will be responsible for approving workflow requests and ensuring that they will get notified.

1. Choose the Start button to open the Approval User Setup wizard.
2. Hover over a field to view an explanation of the setting. The basic settings for using COSMO Regulatory Affairs are:
   - User ID
   - Salespers./Purch. Code
   - Approver ID
   - Substitute
   - E-Mail
   - Approval Administrator (if not deactivated in Regulatory Affairs Setup)
3. To set up approval request notifications, choose the Notification Setup action.
4. Hover over a field to view an explanation of the setting.
5. Go back to the Approval User Setup page and add remaining users.
6. Choose the Close button to return to the checklist.
7. Choose the Mark as completed checkbox to proceed to the next step of the checklist.

Password Setup

The Setup your password step allows you to create your password that will be needed when Single-Factor Authentication (SFA) is required for an approval request.

> **Note**
> **Passwords are set up by each user so this step is only relevant for the user completing the setup checklist. You can skip this step if you are not or will not be an approval user.**

1. Choose the Start button to open the Regulatory Affairs Authentication page.
2. In the New Password and Confirm New Password fields, enter the password, ensuring it meets the password requirements defined in the Regulatory Affairs Setup page.
3. Choose the Finish button to return to the checklist.
4. Choose the Mark as completed checkbox to proceed to the next step of the checklist.

Workflow User Groups

The Workflow User Groups step allows you to create the user groups needed for approving workflow requests based on approval users.

1. Choose the Start button to open the Workflow User Groups page.
2. In the Code field, enter a unique identifier for the workflow user group.
3. In the Description field, enter a short descriptor for the workflow user group.
4. Choose the Edit action to open the Workflow User Group page.

5. Assign the approval users to the user group and then use the following information to designate if anyone in the group can approve or if there is a hierarchy to the approval:
   - If any user within the group can approve a workflow with no hierarchy, set the Sequence No. field to *1* for every user.
   - If the users in the group need to approve a workflow in a particular order, set hierarchy manually in the Sequence No. field. For example, User1 must approve first so they get Sequence No. = *1*, User5 is next so they get Sequence No. = *2*, User10 is next so they get Sequence No. = *3*, and so on.
6. Go back to the Workflow User Groups page.
7. Repeat steps 2-6 to add additional workflow user groups.
8. Choose the Close button to return to the checklist.
9. Choose the Mark as completed checkbox to proceed to the next step of the checklist.

Workflow Wizard

The Workflow Wizard step allows you to use an Assisted Setup wizard to specify the basic settings for the following approval workflows:

- Production Order Component
- Prod. Order Routing Line
- Routing
- Production BOM
- Workflow Header
- Workflow Step
- Workflow Step Argument
- Workflow Rule
- Reset Workflow Password
- User Permission Set
- User Group Member (no longer used as of COSMO Regulatory Affairs version 2.2.242685.0)

For more information about each of these workflows, see Workflows.

> **Note**
> **Creating workflows using this wizard only allows you to provide general settings for the workflows. If you need to define workflow conditions and responses, skip this step and create the workflows from the templates.**

1. Choose the Start button to open the Regulatory Affairs Workflow Setup wizard.

2. Choose the Next button to move to the workflow selection.
3. In the Enable the selected approval workflow field, choose the drop-down arrow to select the workflow to set up.
4. Turn on the Enable toggle to activate the workflow for use immediately after creation.
5. Turn on the Authentication toggle to require Single-Factor Authentication (SFA) when approving the workflow.
6. Depending on the selected workflow, additional fields will open. Hover over the fields to view an explanation of the setting.
7. Choose the Next button.
8. In the Approver Type field, choose who is authorized to approve or reject the workflow request, which will be a specific user or a user group. The next field dynamically changes based on the selection. The recommended setup of each option is:

Approver Type	Approver Limit Type	Approver	Workflow User Group Code
Approver	Specific Approver	Select user from the Approval User Setup	N/A
Workflow User Group	N/A	N/A	Select group from Workflow User Groups

9. Choose the Next button and then choose the Finish button to create the workflow and close the Regulatory Affairs Workflow Setup wizard.
10. To use the wizard to create additional workflows, choose Revisit to reopen the Regulatory Affairs Workflow Setup wizard and then follow steps 2-9 until all workflows are created.
11. Choose the Mark as completed checkbox to proceed to the next step of the checklist.

Workflows

The Workflows step allows you create workflows based on templates, which provide the flexibility to define workflow conditions and responses. You can also open workflows created using the Regulatory Affairs Workflow Setup wizard.

1. Choose the Start button to open the Workflows page.
   Previously created workflows are listed and can be opened for extended setup or changes.

2. To create a workflow from a template, choose the New Workflow from Template action.
   The Workflow Templates page opens with all available workflow templates. Templates specific to COSMO Regulatory Affairs are listed under the following groups:
   - Item
   - Production Order
   - User
   - Workflow

   For more information about each of these workflows, see Workflows. If you have the integration with COSMO Advanced Manufacturing Suite, there are additional workflows for COSMO Process Manufacturing and COSMO Quality Assurance.
3. Choose a workflow template line to create the workflow and open the Workflow page for editing.
4. Enter conditions and responses as needed and set the approval user(s). For more information, see Create Workflow from Template and Workflows for specific settings for each workflow.
5. Turn on the Require Authentication Process toggle if Single-Factor Authentication (SFA) is required.
6. Turn on the Enabled toggle to activate the workflow for use immediately.
7. Go back to the Workflows page and then repeat steps 3-6 until all workflows are created.
8. Choose the Close button to return to the checklist.
9. Choose the Mark as completed checkbox to proceed to the next step of the checklist.

RA Documentation

The final step in the checklist is RA Documentation, which opens the COSMO Regulatory Affairs user documentation that you are currently using. In addition to providing further setup information, this documentation provides detailed information about each workflow.

To complete the checklist, close the COSMO Regulatory Affairs user documentation and then choose the Mark as completed checkbox. At this point, you cannot access any of the previous steps, and therefore, you must close the pane to revisit or finish any steps.

Reopen Closed Checklist

Once the checklist is closed, by completing or skipping the checklist steps or closing the

Get started pane, you can revisit any step by choosing Back to checklist in the pane. If the pane is closed, you can reopen it by choosing the Resume button.

The checklist will indicate unopened steps with an empty circle ( ), completed steps with a check mark (), and skipped steps with a dash (-). To reopen a completed step, choose Revisit; to begin an unopened or skipped step, choose the Start button.

See Also

App Installation
App Activation
Setup

Feedback

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App Activation

COSMO Regulatory Affairs has its own activation button in the setup page that makes pages and controls visible for the product.

> **Note**
>
> **Turning on the toggle in the setup pages will require logged in users to restart the application.**

1. Choose the icon, enter Regulatory Affairs Setup, and then choose the related link.
2. On the General FastTab, turn on the Enable Application Area toggle.
3. Close the page or continue with further setup (see Regulatory Affairs Setup).

See Also

App Installation
App Licensing and Registration
Role Center

Feedback

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Role Center

COSMO Regulatory Affairs has a special Role Center that is used with the *Compliance Manager* Profile (Role). This Role Center provides the most efficient COSMO Regulatory Affairs user experience.

This Role Center provides quick access to workflow and workflow user group lists. If setup has not been completed, an Assisted Setup section provides a guided setup experience.

The Approvals part uses cues to provide a visual overview of the number of approval requests sent and approved. The Email Status part uses cues to provide a visual overview of the number of failed, draft, and sent emails.

To apply this role center

1. Choose the icon and then select My Settings from the menu. Alternatively, you can use the Tell Me feature.
2. In the Role field, choose the ellipsis button.
3. In the Available Roles page, select *Compliance Manager* and then choose the OK button.
4. Choose the OK button to close the My Settings page and save your changes.

See Also

App Installation
App Licensing and Registration
Assisted Setup
App Activation
Microsoft Documentation

Feedback

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Setup

The settings for using COSMO Regulatory Affairs and requirements for the additional Single-Factor Authentication (SFA) are described in this section.

The following table describes the setup areas, with links to the topics that describe them.

To	See
Activate COSMO Regulatory Affairs and set the authentication policies.	Regulatory Affairs Setup
Manage user approval passwords.	Authentication Management

Feedback

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Regulatory Affairs Setup

Regulatory Affairs Setup allows you to configure the authentication policy for approval workflows. Password-based authentication enables you to authenticate designated approvers before they can approve an event.

In the Regulatory Affairs Setup page, you enable the application areas and define password settings for the additional authentication security.

To set up authentication policies

1. Choose the icon, enter Regulatory Affairs Setup, and then choose the related link.
2. On the Regulatory Affairs Setup page, fill in or update the fields as described in the following table.

Field	Description
Enable Application Area	Makes pages and controls visible for COSMO Regulatory Affairs (see App Activation).
Password Expiration Formula / Notification Formula	Together these fields determine when a notification will be sent to a user stating that their password will be expiring. For example, if this field is set to *-2D* and the Password Expiration Formula field is set to *2W*, then the user will receive a notification two days before the two weeks time frame has elapsed.
Authentication Timeout	To reduce the frequency of authentication challenges that interrupt the workflow, you can specify a timeout period. This period determines how much time can elapse before an approval user needs to re-enter this password after they have entered it for an approval. For example, if this field is set to 20, then the approval user has 20 seconds after entering their password before they will be asked to enter it again for another approval request.

Field	Description
Max. Failed Login Attempts	Limits the number of failed attempts an approval user can enter their authentication password for an approval request. Depending on the setting you choose, a suspended user won't be able to approve COSMO Regulatory Affairs processes until the password is reset. The user that is suspended or a different user with the necessary permissions can create an approval request to remove the suspension using the Reset Approval Password action (see Reset User Workflow Password). The user will be reinstated after the approval request for the password reset has been approved. Now the user can set a new password or will be asked to set a new password the first time they try to approve a request after suspension has been removed. If the number is set to zero (0), then this restriction is deactivated and the number of attempts is unlimited.
Password Log Size	Specifies the number of unique new passwords that must be associated with a user account for authentication before an old password can be reused.
Password Min. Size	Specifies the minimum number of characters that are required for the password.
Min. Lowercase	Specifies the minimum number of lowercase characters that are required for the password.
Min. Uppercase	Specifies the minimum number of uppercase characters that are required for the password.
Min. Numbers	Specifies the minimum number of numerical characters that are required for the password.
Min. Special Characters	Specifies the minimum number of special characters that are required for the password.
Deactivate Approval Admin. Permission	Deactivates the standard behavior of the Approval Administrator, which allows a single user to approve or reject any request, even if that person is not the approver or part of the approval group.

Field	Description
Comments Requirement	Determines whether a comment is required when requesting, cancelling, approving, rejecting, or delegating approval requests. The options are: - *None*: Comments are not required and the Approval Entry Comment dialog box does not open. - *Optional*: The Approval Entry Comment dialog box opens and a comment can be entered or bypassed by choosing the OK or Cancel button. - *Mandatory*: The Approval Entry Comment dialog box opens and a comment must be entered. Choosing the OK or Cancel button produces an error and the request will not be completed. Once a comment is added, the OK button can be chosen and the request can be processed.
Rerun Delay (sec.)	Specifies how many seconds to wait before re-running a job queue task in the event of a failure. This is used with the asynchronous workflows.

See Also

Authentication Management

Feedback

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Authentication Management

If you are activating the additional Single-Factor Authentication (SFA) in COSMO Regulatory Affairs, each approval user must create an approval password. This can be done prior to or at the time of receiving an approval request. COSMO Regulatory Affairs also provides a log which shows all authentications that have been processed.

Manage Approval Passwords

Approval passwords are managed in the User Card or the Requests to Approve page. The relevant actions on the Authentication menu are described in the following table.

Action	Description
Set Workflow Password	Creates a password based on the password policies in the Regulatory Affairs Setup page. For more information, see Regulatory Affairs Setup.
Update Workflow Password	Existing password will be replaced by entering current password and new password. *NOTE: There is a workflow for approving the reset of a workflow password. For more information, see Reset User Workflow Password.*
Reset Workflow Password	Existing password is deactivated and cannot be used again until it meets the password policy as indicated in the Password Log Size field in the Regulatory Affairs Setup page. Use the Set Workflow Password action to create a new password.

New password prior to approvals

If the user is setting up their password before receiving any approval requests, they need to open their User Card.

1. Choose the icon, enter Users, and then choose the related link.
2. Select their user and then on the Authentication menu, choose the Set Workflow Password action.
3. Following the password requirements in the Regulatory Affairs Setup page, enter the password once and then again to confirm the password.

> **Note**
> **Users can also create their password from the Requests to Approve page.**

New password during approvals

If a user has not set up their password and receives an approval request, a dialog page will open for them to create their password when they choose the Approve action for the request.

Authentication Log

The Regulatory Affairs Authentication Log page shows all authentications that have been processed, including completed and failed attempts, and provides access to the approval entries or item ledger entries for journal postings. Access this page by choosing the icon, enter Regulatory Affairs Authentication Log, and then choose the related link.

Each time an approval user attempts or completes a COSMO Regulatory Affairs process, a record is created in the log with their User ID, date and time, and a particular Log Type. These Log Types are described in the following table.

Log Type	Description
No Authentication Needed	Authentication was not enabled for the workflow so the user approved the request with no authentication.
Authenticated	Authentication was enabled for the workflow and the user approved the request with proper authentication.
Authentication failed	Authentication was enabled for the workflow and the user did not approve the request due to an incorrect password. The Attempt field indicates how many times the user tried to enter their password and failed.
Time Base Authentication	Authentication was enabled for the workflow and the user approved the request within the allowed time frame for approving requests without needing to reenter a password (see the Authentication Timeout field in Regulatory Affairs Setup).
Suspended Account	User failed to enter their password correctly more times than allowed and, therefore, their account is suspended (see the Max. Failed Login Attempts field in Regulatory Affairs Setup).
New Password	User created a new password.
Update Password	User updated their current password.

For quick reference, the Details field shows the same information that is in the Details field in the Approval Entries Log page and the Approval Entry Text field shows the entry number of the approval request that relates to the log record.

For entries relating to authentication, you can open the approval entries by choosing the **Approval Entry** action. For journal posting entries, you can also access the related item ledger entries by choosing the **Item Ledger Entries** action.

Feedback

Submit feedback for this page .

COSMO Regulatory Affairs Workflows

COSMO Regulatory Affairs includes several workflows that you create from templates. After creating the workflows, you can add approvers and conditions for pending approvals as well as determine if additional authentication is required.

The following groups of templates used with COSMO Regulatory Affairs are located in the Workflow Templates page:

- Item
  - Block New Item Workflow
  - Item Blocked Change Approval Workflow
  - Post Item Journal Batch Approval Workflow
- Production Order
  - Production BOM Certify Approval Workflow / Production BOM Certify Async Approval Workflow
  - Production BOM Version Certify Approval Workflow / Production BOM Version Certify Async Approval Workflow
  - Production Order Component [Insert, Modify, Delete] Approval Workflow
  - Production Order Routing Line [Insert, Modify, Delete] Approval Workflow
  - Routing Certify Approval Workflow / Routing Certify Async Approval Workflow
  - Routing Version Certify Approval Workflow / Routing Version Certify Async Approval Workflow
- Users
  - User Permission Set [Insert, Modify, Delete] Approval Workflow
  - User Modify Approval Workflow
  - User Setup Reset Password Workflow
- Workflow
  - Workflow Header Modify Approval Workflow
  - Workflow Rule [Modify, Delete] Approval Workflow
  - Workflow Step [Insert, Changes, Delete] Approval Workflow
  - Workflow Step Argument [Insert, Modify, Delete] Approval Workflow

The following table describes the setup areas, with links to the topics that describe them.

To	See
Create a workflow from a template and learn about approvers, pending approval conditions, and authentication.	Create a Workflow from Template

To	See
Block an item immediately from use and require approval for unblocking the item.	Block and Unblock an Item
Require approval for certifying a production BOM or production BOM version.	Certify a Production BOM or Production BOM Version
Require approval for certifying a routing or routing version.	Certify a Routing or Routing Version
Require approval for changing, inserting, or deleting a production order component.	Change Production Order Components
Require approval for changing, inserting, or deleting a production order routing line.	Change Production Order Routing Lines
Require approval to post an inventory or manufacturing journal.	Post Inventory and Manufacturing Journals
Learn about using asynchronous workflows that allow users with limited licenses to approve, reject, or delegate approval requests.	Asynchronous Workflows
Require approval to make changes to existing workflows.	Change Workflows
Require approval to make changes to the User Card page and reset user workflow password.	Change User Settings

Feedback

Submit feedback for this page .

Create a Workflow from Template

All approval workflows are created from the base templates in COSMO Regulatory Affairs. Each workflow contains different approval steps but are all created from templates and managed the same way, except for the Post Item Journal Batch Approval Workflow which has some additional setup. This is addressed in Post Inventory and Manufacturing Journals.

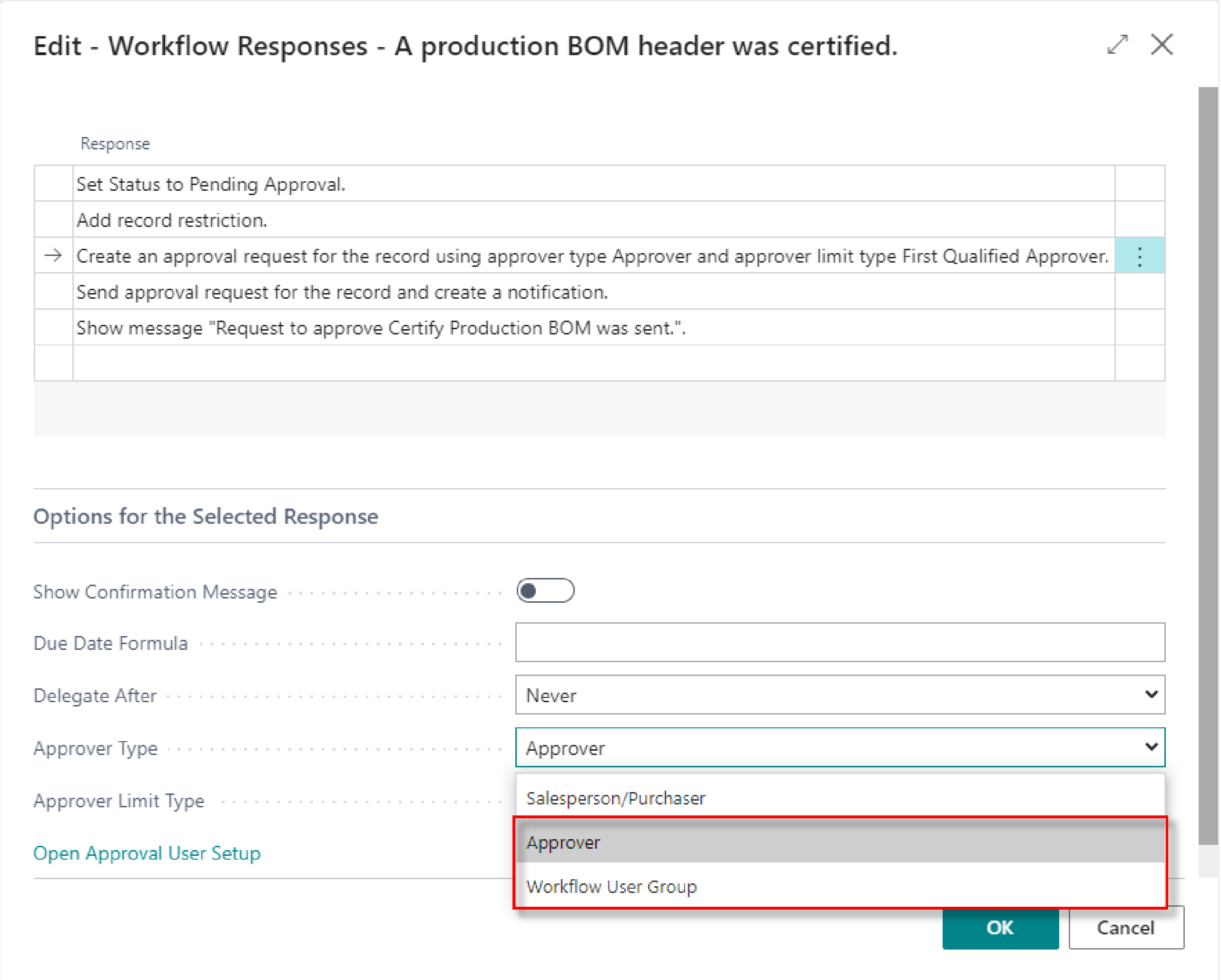
Create a workflow from a template

1. Choose the 🔍 icon, enter Workflows, and then choose the related link.
2. Choose the New Workflow from Template action.
3. In the Workflow Templates page, select the workflow from the Administration group and then choose the OK button.

The new workflow opens; this is a standard Business Central page with some additional settings used with COSMO Regulatory Affairs.

Assign approvers to workflow

After creating the workflow, assign the approver(s) to the approval line. This can be a specific user, a workflow group, or chain of users.



Assign specific user

1. In the Workflow Steps FastTab, select the first entry in the Then Response field. The Workflow Responses request page opens.
2. Select the line starting with "Create an approval request for the record..." in the Response field.
3. In the Options for the Selected Response FastTab, select *Approver* in the Approver Type field.
4. In the Approver Limit Type field, select *Specific Approver*.
5. In the Approver ID field, enter the user's ID.
6. Choose the OK button.

Assign a workflow group

Multiple users within a defined group can be assigned to approve a workflow. These users must already be set up in the Approval User Setup page before creating the workflow group.

First, define the users in the Workflow User Group page.

1. Choose the 🔍 icon, enter Workflow User Group, and then choose the related link.
2. Choose the New action.
3. Enter a name and description for the group.
4. In the Workflow User Group Members FastTab, enter each user that is part of the approval group.
5. Ensure that the Sequence No. field set to *1* for every user.

Next, set the workflow user group on the workflow.

1. In the Workflow Steps FastTab, select the first entry in the Then Response field. The Workflow Responses request page opens.
2. Select the line starting with "Create an approval request for the record..." in the Response field.
3. In the Options for the Selected Response FastTab, select *Workflow User Group* in the Approver Type field.
4. In the Workflow User Group Code field, select the responsible group.
5. Choose the OK button.

Assign a chain of users

If multiple users need to approve a workflow in a particular order, you can set the specified users and the hierarchy in the workflow group. These users must already be set up in the Approval User Setup page.

First, define the hierarchy in the Workflow User Group page.

1. Choose the 🔍 icon, enter Workflow User Group, and then choose the related link.
2. Choose the New action.
3. Enter a name and description for the group.
4. In the Workflow User Group Members FastTab, enter each user that is part of the approval group.
5. In the Sequence No. field, set the hierarchy numerically. For example, User1 must approve first so they get Sequence No. = *1*, User5 is next so they get Sequence No. = *2*, User10 is next so they get Sequence No. = *3*, and so on.

Next, set the workflow user group on the workflow.

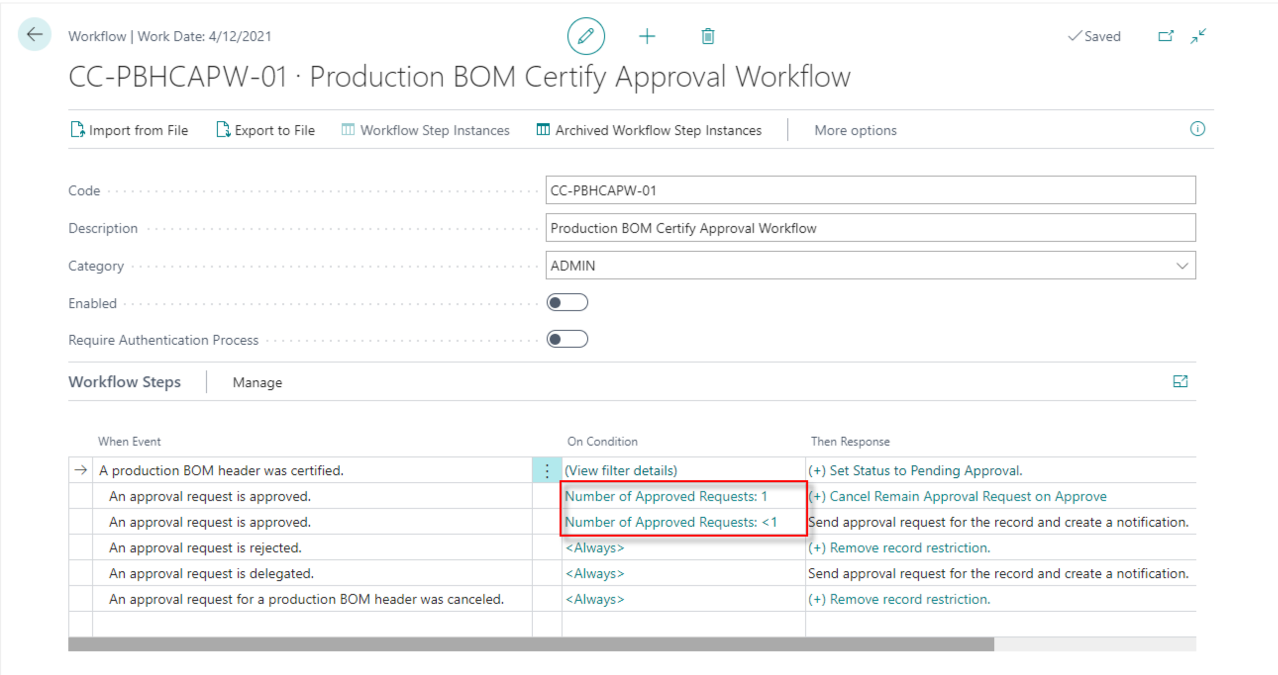
1. In the Workflow Steps FastTab, select the first entry in the Then Response field. The Workflow Responses request page opens.
2. Select the line starting with "Create an approval request for the record..." in the

Response field.

3. In the Options for the Selected Response FastTab, select *Workflow User Group* in the Approver Type field.
4. In the Workflow User Group Code field, select the responsible group.

Set up approval conditions

Approval conditions determine how many users must approve a request and the setup differs depending on if the approver is a specific user, workflow group, or chain of users. The conditions are set in the second and third lines of the Workflow Steps FastTab. In the On Condition field, choose the *Number of Approved Requests* value to open the Event Conditions request page for each line.



Specific approver

When a specific approver is assigned to a workflow, then the Number of Approved Requests field must be set to *1* on the second line. Any other setting will result in no approvals because it is not possible to have more or less than one user.

Workflow group

When a workflow group is assigned to a workflow, then the Number of Approved Requests field on the second line will define how many users in the group must approve the request.

Example

The Number of Approved Requests is set to *3* and there are ten users in the group:

- Any three users in the group need to approve the request.
- Once three users approve the request, the requested changes are made, and all other approval requests will be cancelled.

Chain of users

When a chain of users is assigned to a workflow, then the Number of Approved Requests field on the second and third lines *must* be set to the same value because the conditions are considering how many users are needed to approve the request.

We recommend that you set the Number of Approved Requests to the same number of users in the group, otherwise only certain users can approve the requests.

Below are examples of using different settings and the results of each.

Example – Same number of users as in group

This is the recommended set up when a chain of users need to approve a request.

There are five users in the workflow group. The Number of Approved Requests is set to *5* on the first condition line and *<5* on the second condition line:

- All five users in the group must approve the request in the designated order.
- Once all users in the sequence approve the request, the requested changes are made.

Example – Different number of users as in group

There are five users in the workflow group. The Number of Approved Requests is set to *3* on the first condition line and *<3* on the second condition line:

- The first three users in the group must approve the request.
- The fourth and fifth users are not considered in the approval process.
- Once the first three users in the sequence approve the request, the requested changes are made.

Example – Different settings in condition lines

There are five users in the workflow group. The Number of Approved Requests is set to *3* on the first condition line and *<2* on the second condition line:

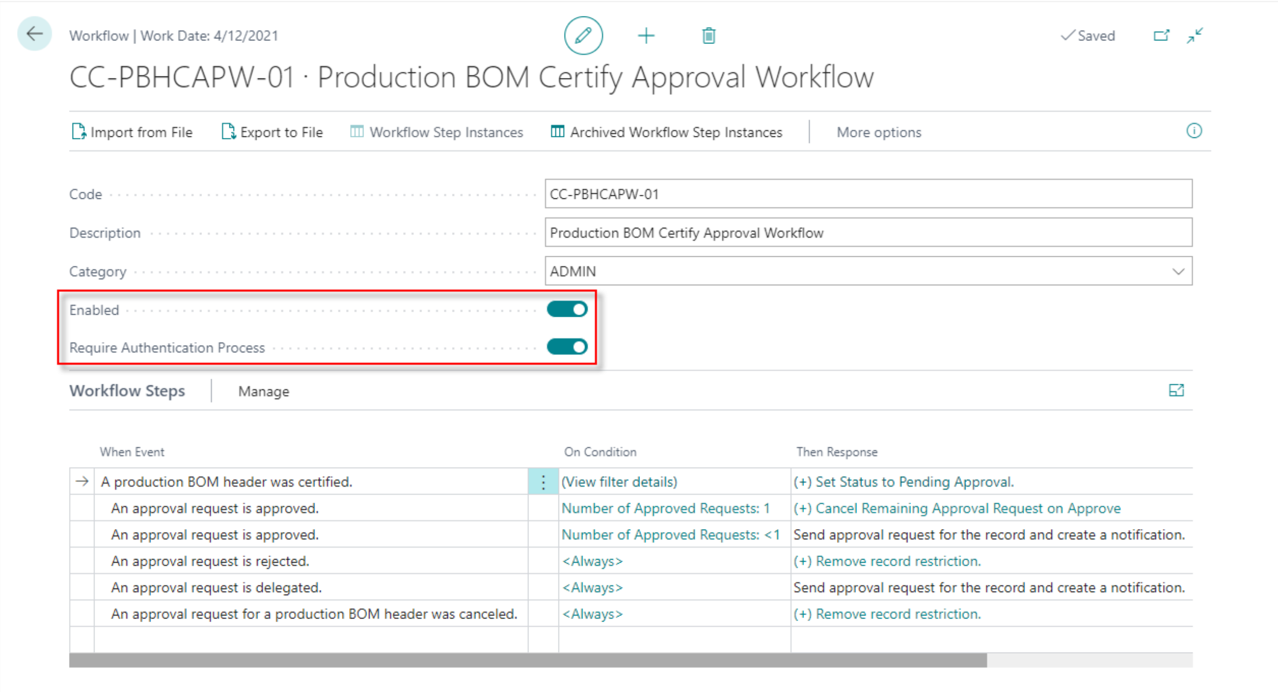
- The first condition line is stating how many approvals are needed to complete the request, which means the first three users in the sequence must approve the request.
- The second condition line determines how many users in the chain will be considered in the approval process, which means the first two users in the sequence are considered.
- The approval process cannot be completed because only two users were considered but three approvals are needed.

Set up Single-Factor Authentication

Applying an additional Single-Factor Authentication (SFA) means that the approver must have a special password in order to approve a workflow. To enable this, turn on the Require Authentication Process toggle.

During the approval process, a separate window will open with the user name and a password field. If the user has not yet set up a password or the password has expired, another window will open for the password creation and then the approval process can continue. If the password expired, the user will need to enter their old password and then a new password.

The password must meet the criteria specified in Regulatory Affairs Setup.



Enable workflow

Turn on the Enabled toggle to immediately activate the approval process requirement from now until the toggle is turned off.

Feedback

Submit feedback for this page .

Block and Unblock an Item

The workflows for blocking an item are used together to block an item and then require approval to unblock the item.

Item Blocking Workflow

The general process for blocking a new item with a workflow is:

1. Create the Block New Item Workflow and Item Blocked Change Approval Workflow workflows from the templates.
2. Assign the approval user or group of users to the Item Blocked Change Approval Workflow workflow.
3. Set the additional authentication if required.
4. Enable the workflows.
5. Create an item from a template.
6. The Blocked toggle is automatically turned on but you can still make other changes in the Item Card.
7. Once you finish your changes, turn off the Blocked toggle.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent and the Blocked toggle is still turned on and is now uneditable.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. The approval user opens the Item Card page or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.
10. The Blocked toggle is turned off on the Item Card.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing Cancel Approval Request on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the action from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose the Open Record action on the Home menu to view the item requesting the change and could then complete the approval directly in the Item Card.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

Example – Unblock an item using an approval workflow

In the following video, workflows have been created from the Block New Item Workflow and Item Blocked Change Approval Workflow workflow templates. A group approval has been assigned to the Item Blocked Change Approval Workflow workflow but only one of the users in the group must approve the change. The workflow requires additional authentication.

A new item is created using an item template. The Blocked toggle is turned on but other set up can be done while the item is blocked.

The user turns off the Blocked toggle. A message opens stating that the approval request has been sent.

Upon closing the message the user sees that the Blocked toggle is turned on and is uneditable. The Approval Entries FactBox shows that an approval request is waiting.

The approval user opens the Requests to Approve page and approves the request by choosing the Approve action on the Home menu. They enter their password because the additional authentication was enabled for this workflow.

The Blocked toggle is turned off on the Item Card. The approval entries show that the request has been approved.

Feedback

Submit feedback for this page .

Certify a Production BOM or Production BOM Version

Any changes made to a production BOM or production BOM version requires that you certify the production BOM or production BOM version. A workflow can be enabled to generate an approval requirement to complete the certification process.

> **Note**
> **Different workflows are used for certifying the production BOM and production BOM version but each is described in this section.**

Production BOM Certification Approval

The general process for approving a production BOM certification with an approval workflow is:

1. Create the Production BOM Certify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Create or open a production BOM.
6. If existing, change the Status to *Under Development*.
7. Add all production BOM information or make changes to the production BOM lines.
8. Change the Status to *Certified*.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
9. If notifications are set up, the approval user(s) receives notification of the approval request.
10. The Status changes to *Pending Approval*.
11. The approval user opens the Production BOM page or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.
12. The Status of the production BOM is changed to *Certified*.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the action from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose the Open Record action on the Home menu to view the production BOM requesting the change and could then complete the approval directly in the Production BOM page.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

Example – Certify a production BOM using an approval workflow

In the following video, a workflow has been created from the Production BOM Certify Approval Workflow workflow template. A workflow user group for manufacturing has been assigned and the workflow requires additional authentication from any the users to complete the certification.

An existing production BOM is opened, the Status is changed to *Under Development* and the line for the bell is removed. When the Status is changed to *Certified*, a message opens stating that the approval request has been sent. The Status changes to *Pending Approval* and no further changes can be made to the production BOM until the approval is complete.

The Approval Entries FactBox shows that an approval request is waiting (Open). The approval user opens the Requests to Approve page and then opens the Production BOM directly to view the changes. The approval user then approves the request by choosing the Approve action on the Home menu and enters their password because the additional authentication was enabled for the workflow.

The Status of the Production BOM changes to *Certified*. The approval entries show that the request has been approved.

Production BOM Version Certification Workflow Approval

The general process for approving a production BOM version certification with an approval workflow is:

1. Create the Production BOM Version Certify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open a production BOM.
6. Create or open the production BOM version.
7. If existing, change the Status to *Under Development*.
8. Add all production BOM information or make changes to the production BOM lines.
9. Change the Status to *Certified*.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
10. If notifications are set up, the approval user(s) receives notification of the approval request.

11. The Status changes to *Pending Approval*.
12. The approval user opens the Production BOM Version page or the Requests to Approve page and approves the request, with or without password depending on authentication requirements.
13. The Status of the production BOM version is changed to *Certified*.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the action from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the 🔍 icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose the Open Record action on the Home menu to view the production BOM version requesting the change and could then complete the approval directly in the Production BOM Version page.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, and the details of the approval request.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

See Also

Asynchronous Workflows

Feedback

Submit feedback for this page .

Certify a Routing or Routing Version

Any changes made to a routing or routing version requires that you certify the routing or routing version. A workflow can be enabled to generate an approval requirement to complete the certification process.

> **Note**
> **Different workflows are used for certifying the routing and routing version but each is described in this section.**

Routing Certification Approval

The general process for approving a routing certification with an approval workflow is:

1. Create the Routing Certify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Create or open a routing.
6. If existing, change the Status to *Under Development*.
7. Add all routing information or make changes to the routing lines.
8. Change the Status to *Certified*.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
9. If notifications are set up, the approval user(s) receives notification of the approval request.
10. The Status changes to *Pending Approval*.
11. The approval user opens the Routing page or the Requests to Approve page and approves the request, with or without password depending on authentication requirements.
12. The Status of the production BOM is changed to *Certified*.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the action from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose the Open Record action on the Home menu to view the routing requesting the change and could then complete the approval directly in the Routing page.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

Example – Certify a routing using an approval workflow

In the following video, a workflow has been created from the Routing Certify Approval Workflow workflow template. A workflow user group for manufacturing has been assigned and the workflow requires additional authentication from any the users to complete the certification.

An existing routing is opened, the Status is changed to *Under Development* and then a change is made to a routing line. When the Status is changed to *Certified*, a message opens stating that the approval request has been sent. The Status changes to *Pending Approval* and no further changes can be made to the routing until the approval is complete.

The Approval Entries FactBox shows that an approval request is waiting (Open). The approval user opens the Requests to Approve page and then opens the Routing directly to view the changes. The approval user then approves the request by choosing the Approve action on the Home menu and enters their password because the additional authentication was enabled for the workflow.

The Status of the routing changes to *Certified*. The approval entries show that the request has been approved.

Routing Version Certification Approval

The general process for approving a routing version certification with an approval workflow is:

1. Create the Routing Version Certify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open a routing.
6. Create or open the routing version.
7. If existing, change the Status to *Under Development*.
8. Add all routing information or make changes to the routing lines.
9. Change the Status to *Certified*.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
10. If notifications are set up, the approval user(s) receives notification of the approval request.
11. The Status changes to *Pending Approval*.
12. The approval user opens the Routing page or the Requests to Approve page and approves the request, with or without password depending on authentication requirements.

13. The Status of the routing is changed to *Certified*.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the action from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose the Open Record action on the Home menu to view the routing version requesting the change and could then complete the approval directly in the Routing Version page.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, and the details of the approval request.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

See Also

Asynchronous Workflows

Feedback

Submit feedback for this page .

Change Production Order Component Lines

Workflows can be enabled to generate an approval requirement to complete any changes made to a production order component line including insertions and deletions. These workflows are valid for use with Planned, Firm Planned, and Released Production Orders.

> **Note**
> **Different workflows are used for modifying, inserting, and deleting production order component lines but each is described in this section.**

Production Order Component Modify Approval

The general process for approving a modification to a production order component line with an approval workflow is:

1. Create the Production Order Component Modify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open a planned, firm planned, or released production order.
6. Open the production order components.
7. Make a change to a component line.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent. Note that the quantity is not changed to the new quantity; this will happen when the request is approved.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. Additional changes can be made to other component lines and new approval requests will be sent, but no changes can be made to lines that have been sent for approval.
10. The approval user opens the Prod. Order Components page or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.

Changes to the production order components are instantaneous; refresh the page (F5) as needed.

Production Order Component Insert Approval

The general process for approving the insertion of a production order component line with an approval workflow is:

1. Create the Production Order Component Insert Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open a planned, firm planned, or released production order.
6. Open the production order component.
7. Insert a component line and fill in the No. field.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. Additional changes can be made to other component lines and new approval requests will be sent, but no changes can be made to lines that have been sent for approval.
10. The approval user opens the Prod. Order Components page or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.

Production Order Component Delete Approval

The general process for approving the deletion of a production order component line with an approval workflow is:

1. Create the Production Order Component Delete Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open a planned, firm planned, or released production order.
6. Open the production order component.
7. Select the component line to delete and then on the Request Approval menu, choose the Delete Line action.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
8. If notifications are set up, the approval user(s) receives notification of the approval request.

9. Additional changes can be made to other component lines and new approval requests will be sent. No other changes can be made to the open/pending request lines until they have been approved.
10. The approval user opens the Prod. Order Components page or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.

> **Note**
> **There are no entries in the Approval Entries Log page for deleted component lines.**

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the action from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose the Open Record action on the Home menu to view the component line requesting the change and could then complete the approval directly in the Prod. Order Component page.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

The entries in the Approval Entries FactBox and the Approval Entries Log page are based on the selected component line.

Example – Modify a production order component line using an approval workflow

In the following video, a workflow has been created from the Production Order Component Modify Approval Workflow workflow template. A group approval has been assigned but only one of the users in the group must approve the change. The workflow requires additional authentication.

A planned production order is opened and then the production order components are opened. On one of the lines, the quantity is changed and after leaving the field, a message opens stating that the approval request has been sent.

The Approval Entries FactBox for the changed line shows that an approval request is waiting. The approval user opens the Requests to Approve page and then opens the Prod. Order Components directly to view the change. The approval user then approves the request by choosing the Approve action on the Home menu and enters their password because the additional authentication was enabled for the workflow.

The approval entries show that the request has been approved and the component lines show the change. In the Prod. Order Components page, the changed line is updated.

Feedback

Submit feedback for this page .

Change Production Order Routing Lines

Workflows can be enabled to generate an approval requirement to complete any changes made to a production order routing line including insertions and deletions. These workflows are valid for use with Planned, Firm Planned, and Released Production Orders.

Note
Different workflows are used for modifying, inserting, and deleting production order routing lines but each is described in this section.

Production Order Routing Line Modify Approval

The general process for approving a modification to a production order routing line with an approval workflow is:

1. Create the Production Order Routing Line Modify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open a planned, firm planned, or released production order.
6. Open the production order routing.
7. Make a change to a routing line.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. Additional changes can be made to other routing lines and new approval requests will be sent, but no changes can be made to lines that have been sent for approval.
10. The approval user opens the Prod. Order Routing page or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.

Changes to the production order routing are instantaneous; refresh the page (F5) as needed.

Production Order Routing Line Insert Approval

The general process for approving the insertion of a production order routing line with an approval workflow is:

1. Create the Production Order Routing Line Insert Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open a planned, firm planned, or released production order.
6. Open the production order routing.
7. Insert a routing line and then fill in the No. field.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
8. The approval user(s) receives notification of the approval request.
9. Additional changes can be made to other routing lines and new approval requests will be sent, but no changes can be made to lines that have been sent for approval.
10. The approval user opens the Prod. Order Routing page or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.

Production Order Routing Line Delete Approval

The general process for approving the deletion of a production order routing line with an approval workflow is:

1. Create the Production Order Routing Line Delete Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open a planned, firm planned, or released production order.
6. Open the production order routing.
7. Select the routing line to delete and then on the Request Approval menu, choose the Delete Line action.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. Additional changes can be made to other routing lines and new approval requests will be sent. No other changes can be made to the open/pending request lines until they

have been approved.

10. The approval user opens the Prod. Order Routing page or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.

> **Note**
> **There are no entries in the Approval Entries Log page for deleted routing lines.**

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the action from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose the Open Record action on the Home menu to view the routing line requesting the change and could then complete the approval directly in the Prod. Order Routing page.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

The entries in the Approval Entries FactBox and the Approval Entries Log page are based on the selected routing line.

Example – Delete and insert a production order routing line using an approval workflow

In the following video, workflows have been created from the Production Order Routing Line Delete Approval Workflow and Production Order Routing Line Insert Approval Workflow workflow templates. A group approval has been assigned to each but only one of the users in the group must approve the change. The workflows require additional authentication.

A planned production order is opened and then the production order routing is opened. An existing routing line is deleted and a message opens stating that the approval request has been sent.

The Approval Entries FactBox shows that an approval request is waiting. The approval user opens the Requests to Approve page and then opens the Prod. Order Routing directly to view the changes. They approve the request by choosing the Approve action on the Home menu. They enter their password because the additional authentication was enabled for this workflow.

In the Prod. Order Routing, the deleted line has been removed. The user then inserts a new routing line. The Approval Entries FactBox shows that an approval request is waiting. The approval user opens the Requests to Approve page and reviews the changes. They approve the request and enter their password because the additional authentication was enabled for this workflow.

The approval entries show that the request has been approved and the routing line has been added. In the Prod. Order Routing, the new line can be edited.

Feedback

Submit feedback for this page .

Post Inventory and Manufacturing Journals

Workflows can be enabled to generate an approval requirement to post any of the following journals:

- Inventory (Item, Recurring Item, Revaluation, Physical Inventory, Item Reclassification)
- Manufacturing (Output, Consumption, Recurring Output, Recurring Consumption, Production)

The Post Item Journal Approval Workflow template is used for each journal, and the specific journal or template type is selected in the workflow. Therefore, the process for creating the workflows is slightly different than the other workflows because you need to assign different journals to each workflow in the Event Conditions page.

For example, you can create an approval workflow for only the Item Journal by entering *ITEM* as the Journal Template Name and then choosing the *Item* option as the Template Type. Or you can create an approval workflow for the Item Journal and Recurring Item Journal by leaving the Journal Template Name empty and entering the *Item* option as the Template Type.

The following table shows the standard journals in Business Central:

Journal	Standard Journal Template Name	Template Type
Item Journal	ITEM	Item
Recurring Item Journal	RECURRING	Item
Revaluation Journal	REVAL	Revaluation
Physical Inventory Journal	PHYS.INV.	Phys. Inventory
Item Reclassification Journal	RECLASS	Transfer
Output Journal	OUTPUT	Output
Consumption Journal	CONSUMP	Consumption

There are no standard journals in Business Central for the following journals. Each should be set up with the following template types:

Journal	Template Type	Recurring
Recurring Output Journal	Output	Yes
Recurring Consumption Journal	Consumption	Yes
Production Journal	Prod. Order	No

Create Item Journal Approval Workflows

The general process for creating an approval workflow for an item journal is:

1. Create the Post Item Journal Batch Approval Workflow workflow from the template.
2. In the Description field, change the journal name to match the type of journal posting approval.
   For example, change *Post Item Journal Batch Approval Workflow* to *Post Consumption Journal Batch Approval Workflow*.
3. In the Workflow Steps FastTab, choose the *(view filter details)* value in the On Condition field on the first line.
4. In the Event Conditions page, choose the Journal Template Name and related Template Type for a specific journal, or only the Template Type to create a workflow for a particular type of journal.
   Use the tables above to choose the correct journal and/or template type for this workflow.
5. Choose the OK button.
6. Assign the approval user or group of users.
7. Set the additional authentication if required.
8. Enable the workflow.
9. Repeat steps 1-8 for the remaining journals that need approval workflows.

Post Journal Workflow Approvals

For journals with an approval workflow, you cannot use the Post action to post the journal. You must request approval and once the journal is approved, it is automatically posted.

The general process for posting a journal with an approval workflow is:

1. Open the journal.
2. Enter relevant lines manually or using any automatic line generation function.
3. On the Request Approval menu, choose the Send Approval Request action.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
4. If notifications are set up, the approval user(s) receives notification of the approval request.
5. The approval user opens the journal or the Requests to Approve page (using Tell Me) and approves the request, with or without password depending on authentication requirements.

6. The journal is posted automatically upon approval.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

> **Note**
> **Due to the temporary nature of Production Journals, corresponding approval requests are automatically canceled when the journal is closed if entries are not posted.**

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the action from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose Open Record > Edit Journal to view the journal requesting the change and could then complete the approval directly in the corresponding journal page.

> **Note**
> **Due to the temporary nature of Production Journals, the corresponding Production Journal cannot be accessed from the Open Record action.**

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

Example – Post an output journal with an approval workflow

In the following video, a workflow has been created from the Post Item Journal Batch Approval Workflow workflow template for an output journal. A group approval has been assigned but only one of the users in the group must approve the change. The workflow requires additional authentication.

An output journal with an exploded routing is opened and then the Send Approval Request action is selected. A message opens stating that the approval request has been sent.

The Approval Entries FactBox shows that an approval request is waiting. The approval user opens the Requests to Approve page, opens the output journal to review the request and then approves it by choosing the Approve action on the Home menu.

The journal is automatically posted and, thus, no entries remain.

Feedback

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Asynchronous Workflows

Asynchronous workflows allow all users – even those with limited license capabilities – to participate in the approval, rejection, or delegation of an approval request. This expands the number of users who can advance the approval process without the need for additional full licenses. There are asynchronous workflows for the following processes:

- Certify Routing/Routing Version
- Certify Production BOM/Production BOM Version

The asynchronous workflows have the same functionality as the base workflows. The names are the same except the asynchronous workflows contain the word "Async" in the name, e.g., Routing Certify Async Approval Workflow. After creating the workflows, assign the approval users, set authentication requirements, and then enable the workflow(s).

The general process of using any of the asynchronous workflows is:

1. A user with full license rights changes the Status to *Certified* on a Routing, Routing Version, Production BOM, or Production BOM Version.
    - The Status changes to *Pending Approval* and an approval request is sent to the approval users.
    - A Job Queue Entry is created with a Status of *On Hold*.
2. Any of the approval users can approve the request but the result is different based on whether the user has a full license or a limited license:

License	Result
Full	The user can approve the request directly from the documents or the Requests to Approve page. The approval is processed and the Status of the Routing, Routing Version, Production BOM, or Production BOM Version is immediately changed to *Certified*.

License	Result
Limited	The user can only approve the request from the **Requests to Approve** page. The approval is processed but the **Status** of the Routing, Routing Version, Production BOM, or Production BOM Version remains at *Pending Approval* because the user is not authorized to make changes to the record. However, the **Status** is set to *Approved* in the **Approval Entries** FactBox. The **Status** of the related Job Queue Entry changes to *Ready*. Once an authorized user (full license) logs in, the job queue process is triggered and will execute the codeunit. If the approval takes too long, for whatever reason, any authorized user can open the **Job Queue Entries** page and run the **Restart** or **Run once (foreground)** action for the "CCS RA JQ [..]" codeunit created for the approval request. *NOTE: The* ***Rerun Delay (sec.)*** *field in the* ***Regulatory Affairs Setup*** *page determines how long to wait (in seconds) before attempting to rerun the codeunit in case of any failures.* Once successfully executed, the **Status** of the Routing, Routing Version, Production BOM, or Production BOM Version is changed to *Certified*.

See Also

Certify a Production BOM or Production BOM Version
Certify a Routing or Routing Version

Feedback

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Change Workflows

Workflow templates can be enabled to generate an approval requirement to complete changes made to an existing workflow, including insertions and deletions. The approvals are based on changes to events, conditions, and responses, as well as to renaming and enabling the workflow and activating the authentication.

The templates work together and individually to generate the approvals. Often the way the template works depends on how the events are set up. For example, a condition of a Workflow Event can be a Workflow Step Argument or a Workflow Rule.

The following table describes the use of each template but is not limited to these descriptions due to possible event setups.

Workflow Template	Description
Workflow Header Modify Approval Workflow	Generates an approval request when the following changes are made in the workflow header: - Code field is changed. - Enabled toggle is turned off or on. - Require Authentication Process toggle is turned off or on.
Workflow Step Approval Workflows	Generates an approval request when an event or response is changed in the Workflow Steps FastTab. There are workflows for modifying, inserting, and deleting steps.
Workflow Step Argument Approval Workflows	Generates an approval request if an argument for a condition or response is changed for an event. - For conditions, the arguments are not always definitive so you can add, remove, or modify the arguments as needed. For example, you can open an event condition and make any changes necessary and essentially change the entire condition. - For responses, the arguments are typically fixed and the options within the arguments are changed. For example, in a response argument for an approval request, the argument will remain but the options for notifying the sender can be added, removed, or modified without affecting the response. There are workflows for modifying, inserting, and deleting step arguments.

Workflow Template	Description
Workflow Rule Approval Workflows	Generates an approval request when changes are made to event conditions that have a workflow rule. The condition can be a Workflow Step Argument or a Workflow Rule, or both. There are workflows for modifying and deleting rules.

Note

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Feedback

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Changes to Workflow Header

As described above, approvals can be generated for modifying header information on a workflow, including changing the Code field or turning off/on the Enabled or Require Authentication Process toggles.

To enable or disable a workflow

The general process for enabling or disabling a workflow with an approval workflow is:

1. Create the Workflow Header Modify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the existing workflow template that requires a modification to the header.
6. If enabled, turn off the Enabled toggle. If not enabled, turn on the Enabled toggle. Enter a comment if necessary and then a message opens stating that the Workflow header change was sent for approval.
7. If notifications are set up, the approval user(s) receives notification of the approval request.
8. Approval users approve the request, with or without password depending on authentication requirements, by opening the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).
9. If you need to enable the workflow after making changes, a new approval request will be sent once you turn the Enabled toggle back on.

To change authentication requirements on a workflow

The general process for changing the authentication requirements in a workflow with an approval workflow is:

1. Create the Workflow Header Modify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.

5. Open the existing workflow template that requires a modification to the header.
6. If enabled, turn off the Enabled toggle.
   A message opens stating that the Workflow header change was sent for approval.

   > **Note**
   > **The request must be approved before other changes can be made to the workflow.**

7. Turn on or turn off the Require Authentication Process toggle.
   Enter a comment if necessary and then a message opens stating that the Workflow header change was sent for approval.
8. If notifications are set up, the approval user(s) receives notification of the approval request(s).
9. Approval users approve the request(s), with or without password depending on authentication requirements, by opening the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).
10. If you need to enable the workflow after making changes, a new approval request will be sent once you turn the Enabled toggle back on.

To change the Code field in a workflow

The general process for changing the Code field in a workflow with an approval workflow is:

1. Create the Workflow Header Modify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the existing workflow template that requires a modification to the header.
6. If enabled, turn off the Enabled toggle.
   Enter a comment if necessary and then a message opens stating that the Workflow header change was sent for approval.

   > **Note**
   > **The request must be approved before other changes can be made to the workflow.**

7. In the Code field, make changes as needed and then leave the field.
8. A message opens asking if you want to continue with updating related records. Choose the Yes button to continue with the change.
   Enter a comment if necessary and then a message opens stating that the Workflow header change was sent for approval.
9. If notifications are set up, the approval user(s) receives notification of the approval request(s).
10. Approval users approve the request(s), with or without password depending on authentication requirements, by opening the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).
11. If you need to enable the workflow after making changes, a new approval request will be sent once you turn the Enabled toggle back on.

Feedback

Submit feedback for this page .

Changes to Workflow Steps

As described above, approvals can be generated for changes to workflow steps (events and responses).

To modify and insert events and responses

The Workflow Step Changes Approval Workflow and Workflow Step Insert Approval Workflow workflows control the approval requests for modifying and inserting events and responses.

The general process for approving a modification to or insertion of an event or response step in a workflow template with an approval workflow is:

1. Create the Workflow Step Changes Approval Workflow and Workflow Step Insert Approval Workflow workflows from the templates.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflows.
5. Open the existing workflow template that requires an event or response modification or insertion.
6. Turn off the Enabled toggle.
7. Make a change to an event or response, or insert an event or response.
   Enter a comment if necessary and then a message opens stating that an approval request has been sent.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. Additional changes can be made to other events or responses and new approval requests will be sent, but no changes can be made to ones that have been sent for approval.
10. Approval users approve the request, with or without password depending on authentication requirements, from the following:
    - For events, open the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).
    - For responses, select the response in the Workflow Responses FactBox and then choose the drop-down arrow to access the approval options. Responses can also be approved using the same methods for events or by choosing Approval Entries in the Workflow Responses FactBox.

Changes to the workflow template are instantaneous; refresh the page (F5) as needed.

To delete events and responses

The Workflow Step Delete Approval Workflow workflow controls the approval requests for deleting events and responses. Deletion of responses are handled in the Workflow Responses FactBox.

The general process for approving the deletion of a step in a workflow template with an approval workflow is:

1. Create the Workflow Step Delete Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the existing workflow template that requires a deletion.
6. Turn off the Enabled toggle.
7. For events:
    1. Select the step with the event to delete.
    2. On the Workflow Steps FastTab, choose Request Approval > Delete Line.
       Enter a comment if necessary and then a message opens stating that a request to delete a Workflow Step was sent for approval.
8. For responses:
    1. Select the step with a response to deleted.
    2. Choose the response in the Workflow Responses FastTab.
    3. Choose the drop-down arrow on the Workflow Responses FactBox name.
    4. Choose the Delete Line action.
       Enter a comment if necessary and then a message opens stating that a request to delete a Workflow Step was sent for approval.
9. If notifications are set up, the approval user(s) receives notification of the approval request.
10. Additional changes can be made to other workflow steps and new approval requests will be sent.
11. Approval users approve the request, with or without password depending on authentication requirements, from the following:
    - For events, open the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).
    - For responses, select the response in the Workflow Responses FactBox and then

choose the drop-down arrow to access the approval options. Responses can also be approved using the same methods for events or by choosing **Approval Entries** in the **Workflow Responses** FactBox.

Feedback

Submit feedback for this page .

Changes to Workflow Step Arguments

As described above, approvals can be generated for changes to workflow step arguments (conditions and response options).

To modify and insert conditions and response options

The Workflow Step Argument Modify Approval Workflow and Workflow Step Argument Insert Approval Workflow workflows control the approval requests for modifying and inserting conditions and response options.

The general process for approving a modification to or insertion of a condition or response option in a workflow template with an approval workflow is:

1. Create the Workflow Step Argument Modify Approval Workflow and Workflow Step Argument Insert Approval Workflow workflows from the templates.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflows.
5. Open the existing workflow template that requires a condition or response detail modification or insertion.
6. Turn off the Enabled toggle.
7. Make a change to a condition or response option, or add a condition to an event or an option to a response.
   Enter a comment if necessary and then a message opens stating that the new Workflow Step Argument was sent for approval.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. Additional changes can be made to other conditions and new approval requests will be sent, but no changes can be made to ones that have been sent for approval.
10. Approval users approve the request, with or without password depending on authentication requirements, by opening the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).

Changes to the workflow template are instantaneous; refresh the page (F5) as needed.

To delete conditions

The Workflow Step Argument Delete Approval Workflow workflow controls the approval requests for deleting conditions. The conditions are deleted using the Request Approval > Delete... actions on the Workflow Steps FastTab. Since a condition in an event can be a step rule, a step argument, or both, there are three options for deleting the condition:

- Delete Event Condition - deletes both the step rule and step argument.
- Delete Workflow Rule - deletes the step rule only.
- Delete Workflow Step Argument - deletes the step argument only.

The general process for approving the deletion to a step argument in a workflow template with an approval workflow is:

1. Create the Workflow Step Argument Delete Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the existing workflow template that requires a deletion.
6. Turn off the Enabled toggle.
7. Depending on the type of condition (step rule, step argument, or both), choose the appropriate action on the Request Approval menu in the Workflow Steps FastTab:
   - Delete Event Condition - deletes both the step rule and step argument.
   - Delete Workflow Rule - deletes the step rule only.
   - Delete Workflow Step Argument - deletes the step argument only.
8. Enter a comment if necessary and then a message opens stating that an approval request has been sent.
9. If notifications are set up, the approval user(s) receives notification of the approval request.
10. Additional changes can be made to other workflow steps and new approval requests will be sent.
11. Approval users approve the request, with or without password depending on authentication requirements, by opening the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).

Feedback

Submit feedback for this page .

Changes to Workflow Rules

As described above, approvals can be generated for modifying or deleting workflow rules in event conditions.

To modify rules in event conditions

The Workflow Rule Modify Approval Workflow workflow controls the approval requests for modifying workflow rules in event conditions.

The general process for approving a modification to a workflow rule in a workflow template with an approval workflow is:

1. Create the Workflow Rule Modify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the existing workflow template that requires a modification to a workflow rule.
6. Turn off the Enabled toggle.
7. Open the condition with a rule to modify.
8. Change the rule and then choose the OK button.
   Enter a comment if necessary and then a message opens stating that the Workflow Rule change was sent for approval.
9. If notifications are set up, the approval user(s) receives notification of the approval request.
10. Additional changes can be made to other events or responses and new approval requests will be sent, but no changes can be made to ones that have been sent for approval.
11. Approval users approve the request, with or without password depending on authentication requirements, by opening the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).

Changes to the workflow template are instantaneous; refresh the page (F5) as needed.

To delete rules in event conditions

The Workflow Rule Delete Approval Workflow workflow controls the approval requests for deleting rules in event conditions. The conditions are deleted using the Request Approval > Delete... actions on the Workflow Steps FastTab. Since a condition in an event can be a step rule, a step argument, or both, there are three options for deleting the condition:

- Delete Event Condition - deletes both the step rule and step argument.
- Delete Workflow Rule - deletes the step rule only.
- Delete Workflow Step Argument - deletes the step argument only.

The general process for approving the deletion to a workflow rule in a workflow template with an approval workflow is:

1. Create the Workflow Rule Delete Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the existing workflow template that requires the deletion of a workflow rule.
6. Turn off the Enabled toggle.
7. Depending on the type of condition (step rule, step argument, or both), choose the appropriate action on the Request Approval menu in the Workflow Steps FastTab:
   - Delete Event Condition - deletes both the step rule and step argument.
   - Delete Workflow Rule - deletes the step rule only.
   - Delete Workflow Step Argument - deletes the step argument only.
8. Enter a comment if necessary and then a message opens stating that an approval request has been sent.
9. If notifications are set up, the approval user(s) receives notification of the approval request.
10. Additional changes can be made to other workflow steps and new approval requests will be sent.
11. Approval users approve the request, with or without password depending on authentication requirements, by opening the Approval Entries Log page (using Request Approval > Approval Entries on the action bar) or the Requests to Approve page (using Tell Me).

Feedback

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Change User Settings

Workflows can be enabled to generate an approval requirement to make changes to the **User Card** page, including header changes, modification, insertion and deletion of user permission sets, and reset of workflow passwords.

The following table describes the setup areas, with links to the topics that describe them.

To	See
Require approval to change general settings in the User Card.	User Modify Approval
Require approval to change user permission sets in the User Card.	User Permission Set Approvals
Require approval for resetting a user's workflow password.	Reset User Workflow Password

Feedback

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User Modify Approval

The User Modify Approval Workflow workflow controls the approval requests for changes in the General FastTab in the User Card page. This workflow does not control changes to the user groups or user permission sets.

To modify user settings

The general process for approving a general modification to a user with an approval workflow is:

1. Create the User Modify Approval Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the User Card that requires a modification.
6. Make a change to a field in the General FastTab for the user.
   Enter a comment if necessary and then a message opens stating that the user change was sent for approval.
7. If notifications are set up, the approval user(s) receives notification of the approval request.
8. The approval user(s) opens the User Card page or the Requests to Approve page and approves the request, with or without password depending on authentication requirements.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request from the Approve menu. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. The Requests to Approve page can also be opened from the User Card by choosing Request Approval > User Requests to Approve.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

Feedback

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User Permission Set Approvals

The User Permission Set [..] Approval Workflow workflows control the approval requests for modifying, inserting, or deleting user permission sets from the User Permission Sets FastTab in the User Card page.

> **Note**
> **Different workflows are used for modifying, inserting, and deleting user permission sets but each is described in this section.**

To modify and insert user permission sets

The general process for approving a modification to or insertion of a user permission set for a user with an approval workflow is:

1. Create the User Permission Set Modify Approval Workflow and User Permission Set Insert Approval Workflow workflows from the templates.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflows.
5. Open the User Card that requires a modification.
6. Add or change a user permission set in the User Permission Sets FastTab for the user. Enter a comment if necessary and then a message opens stating that the approval request was sent.
7. If notifications are set up, the approval user(s) receives notification of the approval request.
8. Additional changes can be made to other user permission sets and new approval requests will be sent, but no changes can be made to lines that have been sent for approval.
9. The approval user(s) opens the User Card page or the Requests to Approve page and approves the request, with or without password depending on authentication requirements.

To delete user permission sets

The general process for approving a deletion of a user permission set for a user with an approval workflow is:

1. Create the User Permission Set Delete Approval Workflow workflow from the the

template.

2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the User Card that requires a modification.
6. Select the user permission set to delete.
7. In the User Permission Sets FastTab, choose Request Approval > Delete Line. Enter a comment if necessary and then a message opens stating that a request to delete a user permission set was sent for approval.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. Additional user permission sets can be deleted and new approval requests will be sent, but no changes can be made to lines that have been sent for approval.
10. The approval user(s) opens the User Card page or the Requests to Approve page and approves the request, with or without password depending on authentication requirements.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Request Approval > Cancel Approval Request action on the User Permission Sets FastTab.

Manage approval requests

A designated user can approve, reject, or delegate an approval request from the Approve menu on the User Permission Sets FastTab. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually.

View approval entries

The **Approval Entries** FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

Feedback

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Reset User Workflow Password

Users can reset their approval passwords in the Requests to Approve and User Card pages. A workflow can be enabled to generate an approval requirement to complete the reset password process.

Once the reset password request has been approved, the user can change their password using the Set Workflow Password action.

To reset a user workflow password

The general process for approving a reset to a workflow password with an approval workflow is:

1. Create the User Setup Reset Password Workflow workflow from the template.
2. Assign the approval user or group of users.
3. Set the additional authentication if required.
4. Enable the workflow.
5. Open the Users list page from Tell Me.
6. Open the card of the user to reset the password.
7. In the Authentication menu, choose the Reset Workflow Password action. Enter a comment if necessary and then a message opens stating that an approval request has been sent.
8. If notifications are set up, the approval user(s) receives notification of the approval request.
9. The approval user opens the User Card page or the Requests to Approve page and approves the request, with or without password depending on authentication requirements.
10. The Set Workflow Password action is now available in the User Card and the user can set their new password.

Enter optional or mandatory comments

If *Optional* or *Mandatory* is entered in the Comments Requirement field in the Regulatory Affairs Setup page, then the Approval Entry Comment dialog box will open when requesting, cancelling, approving, rejecting, or delegating approval requests. Depending on the setting, a comment can or must be entered to complete the specific approval process.

Cancel approval requests

A user can cancel an approval request by choosing the Cancel Approval Request action on the Request Approval menu.

Manage approval requests

A designated user can approve, reject, or delegate an approval request by choosing the Approve Reset Password Request action from the Authentication menu on the User Card. They can also add any necessary comments for the response to the request.

Designated users can also choose the icon, enter Requests to Approve, and then choose the related link. In the Requests to Approve page, they will see their pending approval requests and can manage each request individually. They can choose the Open Record action on the Home menu to view the user requesting the change and could then complete the approval directly in the User Card page.

View approval entries

The Approval Entries FactBox shows the status of an approval request as well as the number of unfinished approvals, the date and time the approval request was sent, the details of the approval request, and comments added during the approval request process.

To see complete information about the approvals, choose the Approval Entries action on the Request Approval menu.

Example – Reset workflow password with an approval workflow

In the following video, a workflow has been created from the User Setup Reset Password Workflow workflow template. A group approval has been assigned but only one of the users in the group must approve the change. The workflow requires additional authentication.

A user needs to reset their password so they open their User Card and choose the Reset Workflow Password action. A message opens stating that the approval request has been sent.

The User Approval Entries FactBox shows that an approval request is waiting. The approval user opens the Requests to Approve page and then approves the request by choosing the Approve action on the Home menu.

Once the approval is complete, the user then chooses the Set Workflow Password action and creates a new workflow password.

Feedback

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Notify User Groups

In standard Microsoft Dynamics 365 Business Central, you can notify a single user about an event in a workflow. This can be related to an approval or not.

COSMO Regulatory Affairs extends this function to allow notifications about an event for user groups. In addition to notifying users when an approval request is made, it might be beneficial to notify a group of users when specific changes are made; for example, to alert the customer service team when customer information changes. In an approval process, it could be useful to alert another group of users who are not part of the approval process; for example, alerting the finance team if a customer's credit limit is changed.

Whether needing to notify user groups about an approval or alerting a group about a change without an approval, you can use the "Create a notification for users on group %1" Workflow Response in approval or non-approval Workflows.

As in Microsoft Dynamics 365 Business Central, the notifications are created in the Notification Entries. Users can be notified by note or email through standard notification setup (see Microsoft Documentation).

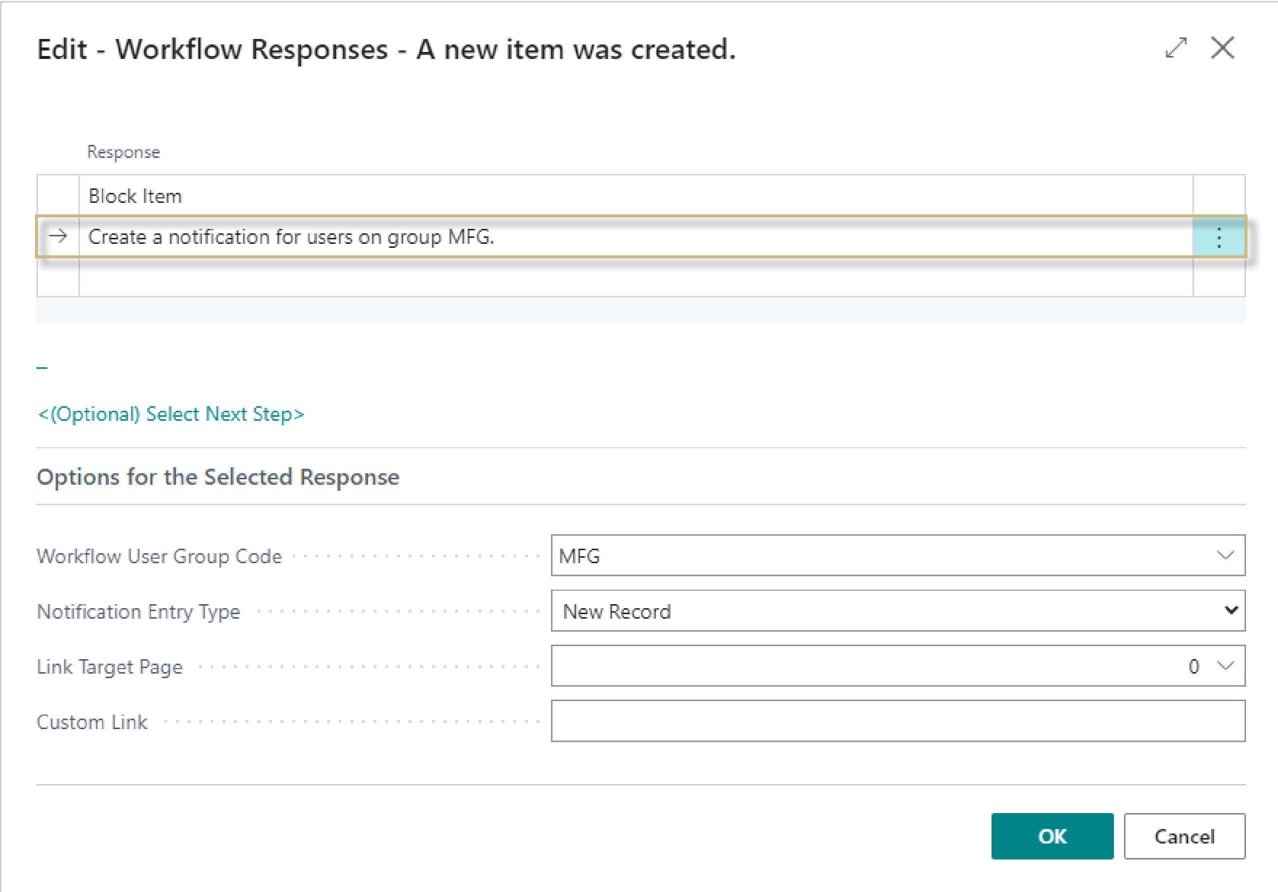
To add user group notification to workflow

1. Create or open a workflow.
2. On the Workflow Steps FastTab, open the response for the step that requires a group notification.
3. In an empty line, choose the ellipsis button in the Response field and then choose the ellipsis button.
4. Select the *Create a notification for users on group %1* option and then choose the OK button.
5. In the Options for the Selected Response FastTab, enter the user group in the Workflow User Group Code field.
6. In the Notification Entry Type field, choose the type of notification that is needed. The options are *New Record*, *Approval*, and *Overdue*.
7. Choose the OK button.

The same process is used for adding a user group notification to a workflow with or without approval. However, a workflow with an approval will have a separate line for creating the approval and sending a notification.

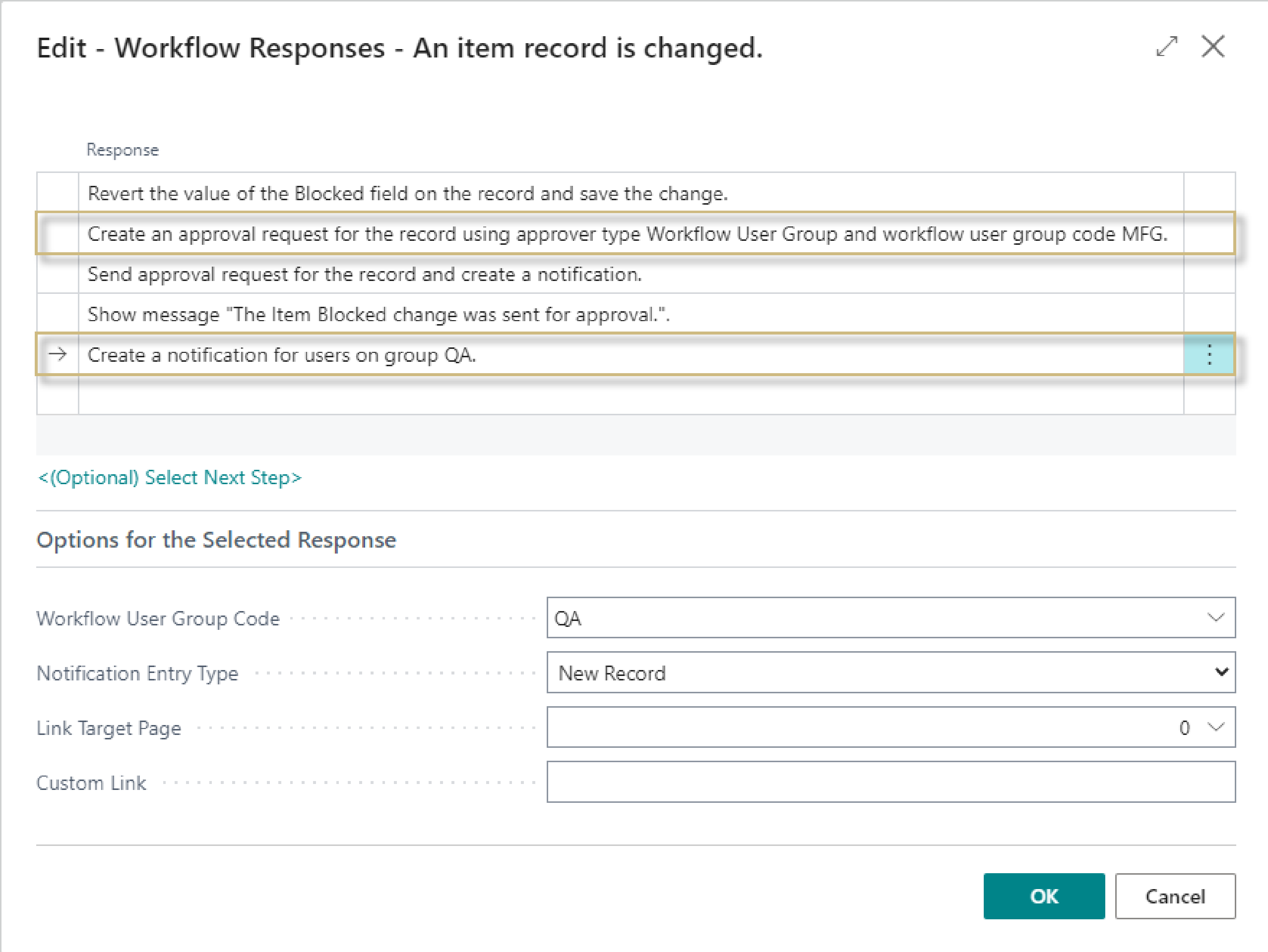
Example - User group notification without approval

In the following graphic, a workflow without approval requirements is set up for blocking an item. By adding the response for notifying the MFG workflow user group, only a notification will be created for those users when an item is blocked.



Example - User group notification with approval

In the following graphic, a workflow with an approval process is set up for changing an item record. When an item record is changed, the MFG user group will receive the approval requests. By adding the response for notifying the QA workflow user group, only a notification will be created for those users when an item is changed, no approval requests.



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Integration to COSMO Products

The integration of COSMO Regulatory Affairs to other COSMO products allows you to add approval workflows for controlling:

- COSMO Discrete Manufacturing processes (certification of checklist templates and master BOMs)
- COSMO Process Manufacturing processes (certification of production structures, changes to restricted sales setup and work center production rates)
- COSMO Product Data Management processes (status changes to drawings and engineering change orders)
- COSMO Project Manufacturing process (release job procurement lines)
- COSMO Quality Assurance processes (certification of customer certificates and changes to test plans, test plan setup/assignment, sample occurrences, sample drawing instruction, and lot-/serial number information)
- COSMO Vendor Rating process (changing assert terms of delivery)

These integrations are part of the COSMO Advanced Manufacturing Suite (AMS), which integrates COSMO Advanced Manufacturing Pack with other products from COSMO CONSULT. Therefore, the integration information is maintained in the AMS content.

> **Note**
> **Some of the COSMO Process Manufacturing and COSMO Quality Management workflows can be set up using the Regulatory Affairs Workflow Setup wizard.**

The following table provides links to the COSMO Regulatory Affairs integration topics in the AMS content.

To	See
Learn about the integration of COSMO Regulatory Affairs to COSMO Discrete Manufacturing.	Integration to COSMO Discrete Manufacturing
Learn about the integration of COSMO Regulatory Affairs to COSMO Process Manufacturing.	Integration to COSMO Process Manufacturing
Learn about the integration of COSMO Regulatory Affairs to COSMO Product Data Management.	Integration to COSMO Product Data Management
Learn about the integration of COSMO Regulatory Affairs to COSMO Project Manufacturing.	Integration to COSMO Project Manufacturing

To	See
Learn about the integration of COSMO Regulatory Affairs to COSMO Quality Assurance.	Integration to COSMO Quality Assurance
Learn about the integration of COSMO Regulatory Affairs to COSMO Vendor Rating.	Integration to COSMO Vendor Rating

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