



## Data Sheet

# Document Approval Workflow Solutions

Ensure only approved documents are sent to your trading partners

## Solution overview

**The Document Approval workflow allows you to set pre-defined rules to determine if, how and when a document needs to be approved before it is sent to the next leg of its journey. For example, requisitions may need approval based on spend levels, GL or business function structure or any number of variables.**

Document Approvals can be setup and configured to trigger the approval which will immediately notify the approver or approval group a document is awaiting approval. Of course an approval maybe declined or referred or in fact queried using the Query workflow so the approval workflow is highly configurable, intuitive and ensures any document that needs approval is approved before moving to the next stage.

## Key Features

### Cloud based and easy to use

The workflow is accessible via the Web Portal solution and is therefore cloud based and means it is intuitive and easy to use and accessible from anywhere.



### **Any document**

The Document Approval workflow allows for the approval of any document based on the need to do so. However, typically this may be requisitions for suppliers, sales orders, expense invoices or invoices in general.

### **Rules based approval matrix**

Approving a document is not necessarily linear. Approvals for requisitions may need to go via a number of functions and spend levels before it's final approval.

The Document Approval workflow allows any permutation and level setup to approve based on GL code, function and spend levels.

### **Approval group management**

Within the rules matrix approval groups can be assigned and have any number of user's who can approve based on the defined level. Approval groups can also be configured to load balance approvals so it isn't always the same person who is approving everything at that level.

### **Automated notifications**

If you're set as an approver within the Document Approval workflow there's no need to sit watching the application for something to approve, or not.

The workflow will automatically generate notification emails based on the approval group you belong to so you're automatically notified when you need to approve a document.

### **Action based rules**

Approvers can take a number of pre-defined and configurable actions with each approval request. Documents can be referred to other users, rejected, archived or even queried if you use the Query workflow.

The workflow is largely configurable and outcome based, define the rule(s) and you're away.

### **Audit and control**

Of course with every B2BE workflow the audit and control elements are key to ensure historical approvals, rejections or any other action are fully auditable so at any time they can be referred to in the event of an issue.

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