

# Business One in Action - Why a Draft Document In an Approval Process Cannot Be Modified By the Originator?



## Applies to:

SAP Business One, Administration, [Approval and Alerts](#)

## Summary:

This illustrates a scenario wherein the originator is prevented from modifying an approval template. It also shows how to successfully amend the draft which is within the approval process.

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## Author Bio:

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## Why a Draft Document in an Approval Process Cannot Be Modified By the Originator?

Documentation: Approval Procedures in Version 2004

Online Help for Releases 2007 and 8.8

Notes [1321234](#), [1111431](#)

Since SAP Business One version 2007, it is possible to update a draft which is in an approval cycle; however, there are cases when the originator may not be able to update the draft.

### System behaviour

In order to understand why the draft is not available for updating, it is necessary to verify the following:

- Number of Approvers

This is set in the *Stages* tab of the *Approval Template - Setup* window. If there is more than one user listed as *Approver*, and only one approval is required, the system provides an opportunity to other approvers to approve or not to approve the document.

- Number of Approvals Required

If the number of *Approvers* who have not rendered their decision is greater than or equal to the 'Approvals' required (e.g. approvers – 2, required approvals – 2) the system keeps the document within the approval process. This is to allow the other 'Approvers' to decide on the document.

The draft document is already 'approved'; therefore, no modification can be accepted.

## Pending Status

An approval template is created for user Bill Levine when posting a *Stock Transfer* document.

The image displays two overlapping screenshots of the 'Approval Templates - Setup' dialog box in SAP.

**Top Screenshot (Originator Tab):**

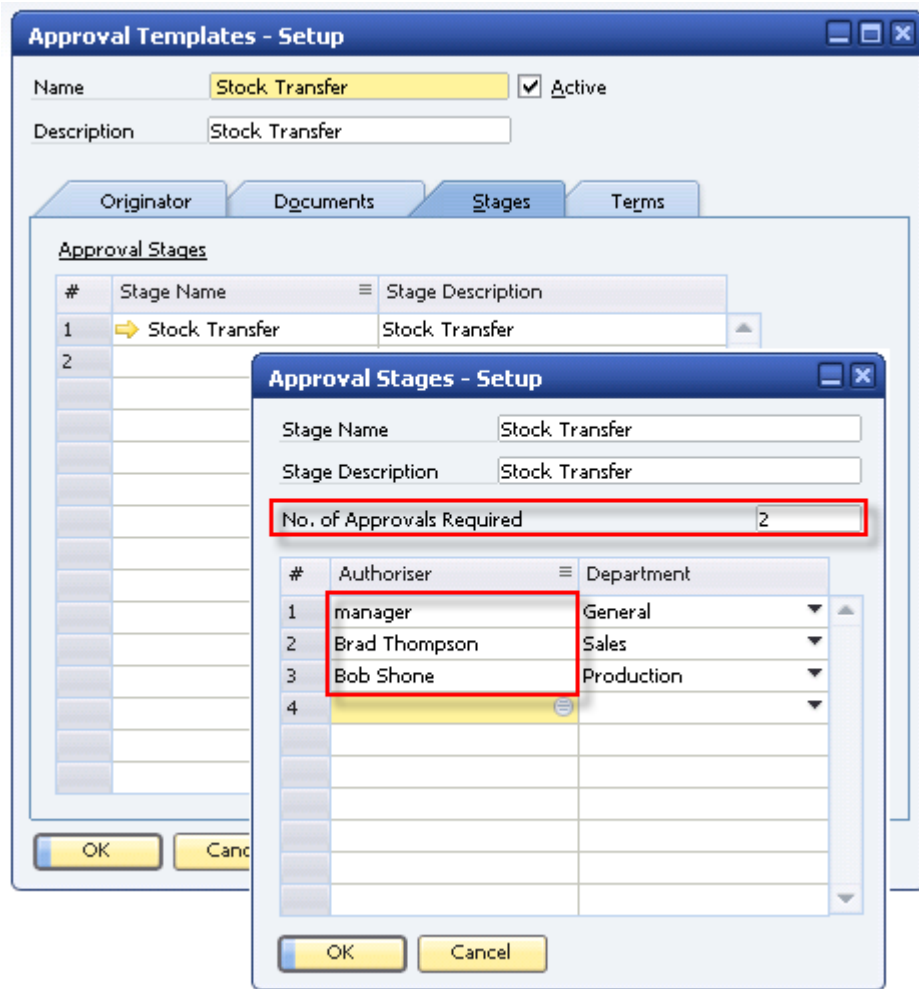
- Name: Stock Transfer
- Description: Stock Transfer
- Active:
- Originator Tab:
 

	User	Department
1	Bill Levine	Sales
2		

**Bottom Screenshot (Documents Tab):**

- Name: Stock Transfer
- Description: Stock Transfer
- Active:
- Documents Category:  Documents
- Stock Category:  Stock
  - Sales Quotation
  - Sales Order
  - Delivery
  - Returns
  - AR Down Payment
  - AR Invoice
  - AR Credit Note
  - Goods Receipt
  - Goods Issue
  - Stock Transfer
- Purchasing - AP Category:  Purchasing - AP
  - Purchase Order
  - Goods Receipt PO
  - Goods Returns
  - AP Down Payment
  - AP Invoice
  - AP Credit Note
- Payment Category:  Payment
  - Outgoing Payment

Two approvals are required and can be authorized by users Manager, Brad and Bob.



User 'Bill' created a *Stock Transfer* document. At this stage, the document is still in *Pending* status.

**Stock Transfer - Draft [Pending]**

Customer: [ ] Number: 1  
 Name: [ ] Series: Primary  
 Contact Person: [ ] Posting Date: 25.05.10  
 Ship to: [ ] Document Date: 25.05.10  
 From Warehouse: 01  
 Price List: Last Purchase Price

#	Item No.	Item Description	To Ware...	Quantity	Item Cost	Unit of Measure
1	A00001	IBM Infoprint 1312	02	2		
2						

Sales Employee: -No Sales Employee- Remarks: Insufficient stock in Warehouse 02. Stock transfer required.  
 Journal Remarks: Stock Transfers -

Add Cancel

User Manager received the request for approval and did not approve the document. In the *Decision* field, *Not Approved* was selected.

**Request for Approval**

The User: **Bill Levine** is requesting an approval to issue Documents - Drafts

**Document Details**  
 Status: Pending Issue Date: 25.05.10  
 Document No.: 1 Document Draft Internal ID: 1

**Authorisation Details**  
 Status: Pending Request Date: 25.05.10  
 Template: Stock Transfer Stage: Stock Transfer  
 Remarks: Please approve.  
 Display History

**Answer**  
 Decision: Not Approved  
 Remarks: Take the stocks from another warehouse.

OK Cancel

Users Bob and Brad have not responded to the request yet. If originator Bill accesses the document, the document will still have a *Pending* status. Only three fields are available for modification. These are: *Document Date*, *Journal Remarks* and *Remarks* fields.

**Stock Transfer - Draft [Pending]**

Customer:   
 Name:   
 Contact Person:   
 Ship to:

Number:   
 Series:   
 Posting Date:   
 Document Date:   
 From Warehouse:   
 Price List:

#	Item No.	Item Description	To Ware...	Quantity	Item Cost	Unit of Measure
1	➔ A00001	IBM Infoprint 1312	➔ 02	2		
2						

Sales Employee:   
 Journal Remarks:   
 Remarks:

If Bill attempts to modify the date, for example, he will receive an error message when trying to add the draft again.

**Stock Transfer - Draft [Pending]**

Customer:  Number: 1  
 Name:  Series: Primary  
 Contact Person:  Posting Date: 25.05.10  
 Ship to:  Document Date: 30.05.10

**Stock Transfer - Draft [Pending]**

The authorisation request for this document was cancelled. The document cannot be added unless the authorisation request is restored.

OK Help

# Item

1	→
2	

Sales Employee: -No Sales Employee- Remarks: Insufficient stock in Warehouse 02. Stock transfer required.

Journal Remarks: Stock Transfers -

Add Cancel

As defined in the Approval Stage, the document needs two approvals and there are three authorizers defined. As only one approver (Manager) provided his answer; the draft document has not changed its status and is therefore still available for the two other approvers (Bob and Brad) to either approve or 'not approve' the document.

**Approval Stages - Setup**

Stage Name: Stock Transfer  
 Stage Description: Stock Transfer  
 No. of Approvals Required: 2

#	Authoriser	Department
1	manager	General
2	Brad Thompson	Sales
3	Bob Shone	Production
4		

OK Cancel



When the second authorizer Brad opens the request for approval, the status of the draft is still *Pending*. Brad can see the remarks added by the previous authorizer, 'Manager'. A red text indicates 'Not approved', while a green text indicates 'Approved'.

**Request for Approval**

The User **Bill Levine** is requesting an approval to issue **Documents - Drafts**

**Document Details**

Status: Pending Issue Date: 25.05.10  
 Document No.: 1 Document Draft Internal ID: 1

**Authorisation Details**

Status: Pending Request Date: 25.05.10  
 Template: Stock Transfer Stage: Stock Transfer  
 Remarks: Please approve.

Stage	Authoriser	Date	Hour	Remarks
Stock Transfe	manager	25.05.10	12:03	Take the stocks from another warehouse.
Stock Transfe	Brad Thompson	25.05.10	12:11	
Stock Transfe	Bob Shone			

**Answer**

Decision: Pending  
 Remarks:

OK Cancel

If Brad does not approve the stock transfer, the status of the document changes from *Pending* to *Rejected*. The last authorizer, Bob no longer needs to approve or 'not approve' the document. Even if 'Bob' approves it, the document still cannot be converted as *Approved* because two approvals are required.

**Request for Approval**

The User **Bill Levine** is requesting an approval to issue **Documents - Drafts**

**Document Details**

Status: Rejected Issue Date: 25.05.10  
 Document No.: 1 Document Draft Internal ID: 1

**Authorisation Details**

Status: Rejected Request Date: 25.05.10  
 Template: Stock Transfer Stage: Stock Transfer  
 Remarks: Please approve.

Stage	Authoriser	Date	Hour	Remarks
Stock Transfer	manager	25.05.10	12:03	Take the stocks from another warehouse.
Stock Transfer	Brad Thompson	25.05.10	12:15	
Stock Transfer	Bob Shone			

**Answer**

Decision: Not Approved  
 Remarks:

OK Cancel

**Stock Transfer - Draft [Rejected]**

Customer: Name: Contact Person: Ship to:

Number: 1 Series: Primary Posting Date: 25.05.10 Document Date: 25.05.10  
 From Warehouse: 01 Price List: Last Purchase Price

#	Item No.	Item Description	To W...	Quantity	Item Cost	Unit of Measure
1	A00001	IBM Infoprint 1312	02	2		
2						

Sales Employee: -No Sales Employee- Remarks: Insufficient stock in Warehouse 02. Stock transfer required.  
 Journal Remarks: Stock Transfers -

Add Cancel

If Brad approves the stock transfer, the status of the document is kept as *Pending*. The draft is available for the third authorizer Bob to complete the requirement of two approvals.

The screenshot shows the 'Request for Approval' dialog box in SAP. The user 'Bill Levine' is requesting an approval to issue a document. The document is in 'Pending' status. The document details include Document No. 1 and Issue Date 25.05.10. The authorization details show the document is a 'Stock Transfer' request dated 25.05.10. The remarks are 'Please approve.' The approval table shows three entries: 'Stock Transfer manager' at 12:03 with the remark 'Take the stocks from another warehouse.', 'Stock Transfer Brad Thompson' at 12:20, and 'Stock Transfer Bob Shone'. The decision is currently 'Pending'.

**Main Menu**  
OEC Computers UK  
Bob Shone

**Administration**

**Request for Approval**

The User **Bill Levine** is requesting an approval to issue **Documents - Drafts**

**Document Details**

Status Pending Issue Date 25.05.10  
Document No. 1 Document Draft Internal ID 1

**Authorisation Details**

Status Pending Request Date 25.05.10  
Template Stock Transfer Stage Stock Transfer  
Remarks Please approve.

Stage	Authoriser	Date	Hour	Remarks
Stock Transfer manager		25.05.10	12:03	Take the stocks from another warehouse.
Stock Transfer Brad Thompson		25.05.10	12:20	
Stock Transfer Bob Shone				

**Answer**

Decision Pending  
Remarks

OK Cancel

## Approved Draft

If 'Bob' approves the document meeting the required two approvals, the document is set to *Approved*. The user can only modify the *Date*, *Journal Remarks* and *Remarks* before adding it.

**Stock Transfer - Draft [Approved]**

Customer		Number	1
Name		Series	Primary
Contact Person		Posting Date	25.05.10
Ship to		Document Date	25.05.10
		From Warehouse	01
		Price List	Last Purchase Price

#	Item No.	Item Description	To Ware...	Quantity	Item Cost	Unit of Measure
1	⇒ A00001	IBM Infoprint 1312	⇒ 02	2		
2						

Sales Employee: -No Sales Employee-      Remarks: Insufficient stock in Warehouse 02. Stock transfer required.

Journal Remarks: Stock Transfers -

## Rejected Draft

If Bob does not approve the document, the status is set to *Rejected*. The new status is visible in the top left header of the draft window. Now, more fields are available for modifications.

The screenshot shows the SAP Stock Transfer - Draft [Rejected] window. The title bar indicates the document is in a 'Rejected' state. The window contains several input fields and a table.

Fields include:

- Customer, Name, Contact Person, Ship to (text fields)
- Number: 1
- Series: Primary
- Posting Date: 25.05.10
- Document Date: 25.05.10
- From Warehouse: 01
- Price List: Last Purchase Price

The table below shows the items to be transferred:

#	Item No.	Item Description	To W...	Quantity	Item Cost	Unit of Measure
1	A00001	IBM Infoprint 1312	02	2		
2						

Additional fields at the bottom include:

- Sales Employee: -No Sales Employee-
- Journal Remarks: Stock Transfers -
- Remarks: Insufficient stock in Warehouse 02. Stock transfer required.

Buttons: Add, Cancel

If the user amends and re-submits the document for approval, the system will prompt the following message showing that the draft is about to be modified.

**Stock Transfer - Draft [Rejected]**

Customer:       Number: 1  
 Name:       Series: Primary  
 Contact Person:       Posting Date: 25.05.10  
 Ship to:       Document Date: 25.05.10

From Warehouse: 01  
 Price List: Last Purchase Price

#	Item No.	Item Description	To W...	Quantity	Item Cost	Unit of Measure
1	A00001	IBM Infoprint 1312	02	2		
2	A00002	IBM Infoprint 1222	02	5		
3						

Sales Empl:   
 Journal Ren:

**System Message**

This draft is closed. Do you want to generate another document from this draft?

Yes      No

Add      Cancel

## Related Contents

- [SAP Business One in Action Catalog Page](#)
- [Link to DRC](#) documentation
- Notes [1321234](#), [1111431](#)
- For more information, visit the [Business One homepage](#).

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