Custom Workflows and Approvals in ERP Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today's fast-paced digital landscape, generic Enterprise Resource Planning (ERP) configurations often create operational bottlenecks and hinder digital transformation. Organizations leveraging an ERP system like SAP, Oracle, or Microsoft Dynamics face constant pressure to optimize internal processes for greater efficiency and compliance. Custom Workflows and Approvals in ERP Training Course offers an immersive, hands-on training solution focusing on the critical skill of customizing and managing complex business process automation through tailored workflow design. Mastering the creation of multi-level approval hierarchies, dynamic routing, and automated notifications is no longer optional it is a core competency for driving operational excellence and maximizing ERP ROI.

This specialized program delves deep into the architecture, configuration, and governance of advanced ERP workflows and approvals. Using a practical case study methodology, participants will move beyond standard functionality to implement low-code/no-code solutions, integrate processes across modules, and ensure robust data integrity. Upon completion, attendees will be equipped as Workflow Champions, capable of translating complex business requirements into high-performing, compliant, and fully auditable automated processes, thereby accelerating decision-making and championing the organization's hyperautomation strategy.

Programme Curriculum

Custom Workflows and Approvals in ERP Training Course

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5 days

Course Objectives

1. Master the principles of Business Process Management (BPM) within the ERP environment.
2. Configure and manage dynamic, multi-step approval workflows
3. Implement conditional and role-based routing logic for precision and compliance.
4. Apply low-code/no-code tools for rapid workflow development and customization.
5. Design automated notifications, reminders, and escalation paths to prevent bottlenecks.
6. Ensure auditability and maintain a full history of all workflow transactions and approvals.
7. Integrate custom workflows seamlessly with core ERP modules like P2P (Procure-to-Pay) and O2C (Order-to-Cash).
8. Develop strategies for effective workflow governance and lifecycle management.
9. Utilize real-time analytics and reporting to monitor workflow performance and identify inefficiencies.
10. Apply best practices for change management when deploying new automated processes.
11. Secure workflows with granular, context-sensitive security and access controls.
12. Leverage AI/ML capabilities to predict and flag high-risk transactions for review.
13. Troubleshoot common workflow errors and perform effective system maintenance and optimization.

Target Audience

1. ERP System Administrators
2. Business Process Owners
3. Functional Consultants
4. IT/Technical Support Staff
5. Departmental Managers
6. Internal Audit and Compliance Teams
7. Key End-Users tasked with high-volume transaction approvals
8. Project Managers overseeing ERP optimization and Hyperautomation initiatives

Course Modules

Module 1: Workflow Foundation & Business Mapping

- Introduction to ERP Workflow Architecture

- Business Process Mapping to visualize and optimize current workflows.
- Identifying "pain points" and automation opportunities
- Defining key components.
- Case Study: Mapping a current manual, paper-based Expense Report approval process and identifying its automation potential.

Module 2: Designing Custom Approval Hierarchies

- Configuring Multi-Level Approvals based on transaction value and GL accounts.
- Implementing Role-Based Access Control for approval authorization.
- Setting up Dynamic Routing based on organizational structure
- Creating parallel and sequential approval paths for efficiency.
- Case Study: Designing a complex Capital Expenditure approval flow that routes to three different approvers based on cost center and amount threshold.

Module 3: Low-Code/No-Code Workflow Configuration

- Utilizing native ERP Workflow Builders and graphical design tools
- Working with Expressions and Conditions for complex routing.
- Integrating user interaction within the workflow steps.
- Creating and leveraging reusable workflow Templates for standardization.
- Case Study: Building a Purchase Requisition approval workflow using a no-code drag-and-drop tool, complete with budget check and vendor master data validation.

Module 4: Advanced Features & Integrations

- Configuring Escalation Management with time-out rules and automatic reassignment.
- Setting up Automated Notifications and reminders.
- Integrating external systems via APIs
- Implementing digital signatures and electronic approvals for paperless operations.
- Case Study: Integrating the Leave Request workflow with the HR module to automatically update employee PTO balances upon final approval.

Module 5: Governance, Audit & Compliance

- Establishing a Workflow Governance framework
- Implementing a complete Audit Trail for every step and decision.
- Ensuring compliance with internal policies and external regulations
- Managing Version Control and deploying changes without disrupting live processes.
- Case Study: Demonstrating the end-to-end auditable trail for a high-risk financial journal entry, satisfying an external auditor's compliance request.

Module 6: Monitoring and Optimization

- Using built-in Workflow Analytics and Dashboards
- Identifying and eliminating common Process Bottlenecks using performance data.
- Techniques for end-user adoption and promoting self-service approvals.
- Applying Continuous Process Improvement principles to automated workflows.
- Case Study: Analyzing a bottleneck in the Invoice Payment workflow and optimizing the routing logic to reduce the average processing time by 30%.

Module 7: Troubleshooting and Maintenance

- Best practices for workflow testing
- Common error messages, log file analysis, and debugging techniques.
- Managing user changes and their impact on active workflows.
- Strategies for planned downtime and system upgrades.
- Case Study: Debugging a failed workflow due to a missing user assignment and correcting the underlying organizational data.

Module 8: Future Trends and Capstone Project

- Introduction to Hyperautomation and the role of workflows.
- Overview of Predictive Workflows using AI/ML for risk scoring.
- Exploring Robotic Process Automation integration with approvals.
- Final Capstone Project: Participants design and build a new, optimized custom workflow based on a real-world scenario provided.
- Case Study: Reviewing a successful Digital Transformation project that utilized custom workflows to unify disparate regional HR processes into a single, automated, global system.

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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