

Discipline Examples

A Discipline is a business rule that prevents unauthorised users from performing certain functions that could affect the outcome of business transactions.

For example, a user can be restricted from ordering above what has been estimated on a CE using Production Rights. A discipline can be created to make an exception for the user to perform this type of transaction with an approval step, called an override.

Disciplines are different from Production Rights, which allow/block certain transactions altogether. However, with disciplines an exception can be made.

Discipline Setup Fields Explained

Configure Discipline
✕

Description:

Companies:

Applies to:

When status in:

Requires Override

Requires Attachment

Primary Conditions

Participants

Additional Conditions

Field 1	Calculation	Value	Comparison	Field 2	Calculation	Value	Allow M
PO Amount Excl...			Greater Than	Total CE Cost L...			<input checked="" type="checkbox"/> ✕

Field Name	Description
Description	Add a summary of the discipline you are trying to create. This will be the name of the discipline and must make sense to you.
Applies to	Select the document the discipline should apply to.
When status in	Specify the status/statuses that the discipline should be applied to. Please note that the status/statuses selected here are related to the document selected in the Applies to field. This is a multi-select field.
Field 1	The field is relevant to the document selected in the Applies to field.
Comparison	A list of comparison operators such as less than, greater than, equals to, etc. comparing field 1 to field 2.

Field 2	The field is relevant to the document selected in the Applies to field.
Requires Override	If checked, an override may be requested to make an exception to the discipline. If unchecked, an exception will not be allowed to the discipline.
Requires Attachment	This may be enabled if the discipline requires an override. If checked, the requested override must be accompanied by supporting documents as attachments.
Allow Modification	This allows the approver to input the value of override allowed, above which further overrides will be triggered on the document or line items in question.

Below are some of the disciplines that can be used.

✓ [Credit Note to check PO funding](#)

Discipline Name:

Credit Note to check PO funding.

Discipline Description and Example:

A user may not change the status of a client Credit Note to Issued, if the issuing of the Credit Note will result in the total value of ordered cost (PO cost) on the job to be greater than the total Billed Amount on the job. Cancelled Purchase Orders will be ignored in this calculation. Please see the example below.

- An external cost was ordered amounting to R 800 and a related client Invoice amounting to R1 000 is created and processed.
- A Credit Note is created with the value R 300 which is currently in draft status.
- Issue the Credit Note which will result in total Billed Amount of R 700 which is less than the ordered cost.
- A discipline violation will be triggered, and an override will be requested.

✓ [PO amount must not be greater than Job CE costs](#)

Discipline Name:

PO amount excluding Offset work types must not be greater than job CE costs

Discipline Description and Example:

This discipline can be used in a case where the PO amounts are greater than Job CE cost excluding offset PO line item amounts. Cancelled Purchase Orders will be ignored in this calculation.

- An approved Cost Estimate with an external work type that has an Estimated Cost of R 1 000 and Amount of R 1 100.
- A Purchase Order of R 1 100 is created (from the Add New button) and the status changed to Checked.
- A discipline violation will be triggered, and an override may be requested.

✓ [Supplier Invoice may not exceed Job PO amount](#)

Discipline Name:

Supplier Invoice may not exceed the PO amount on the job.

Discipline Description and Example:

This discipline can be used to perform a check on Supplier Invoices, in cases where the sum of the value of the Supplier Invoices is greater than the sum of all Purchase Orders on the job.

- A Cost Estimate of R 2 000 is created with:
- An external cost of R 1 000 marked up at 20%, amounting to R 1 200
- The Cost Estimate is approved.
- A Purchase Order of R 1 000 is created.
- Capture a Supplier Invoice from the PO to the value of R 900.
- Capture another Supplier Invoice for R 200. This Supplier Invoice will trigger a discipline violation, and an override may be requested.

✓ [Credit Note to check total Billed Estimated Cost for Job](#)

Discipline Name:

A Credit Note must not cause the Ordered value on a Job to exceed the total Billed Estimated Cost.

Discipline Description and Example:

This discipline can be used in a case where the Billed Estimated Cost portion of the Credit Note causes the total ordered value on the job to be greater than the total Billed Estimated Cost on the job.

- An external work type with a Cost of R 1 000 and Amount of R 1 100.
- Bill the Cost Estimate to create a new Invoice, which will now have a Billed Cost of R 1 000 and an Amount of R 1 000.
- From the Cost Estimate, create a Purchase Order against the line item for R 1 000 and finalise the Purchase Order.
- From the created Invoice, create a Credit Note for the Amount of -R 350, and an automatically calculated Billed Cost of -R 318.18. This will result in an effective Billed Cost of R 681.82 for the Job.
- A discipline violation will be triggered, and an override may be requested.

✓ [Markup on CE line items to match pre-defined percentage](#)

Discipline Name:

%markup on CE line items must always match the %markup defined in the Work Type configuration.

Discipline Description and Example:

This discipline can be used to perform a check on Cost Estimates, in cases where the %markup on a line item is not equal to the %markup defined in the Work Type configuration.

- An external work type was configured with a default markup of 10%. For this example, Design was configured.
- Create a Cost Estimate and select the Design work type defaulting to 10% markup.
- Set the @Cost value to R 1 000, which will result in an Amount of R 1 100.
- Change the %markup to 20%, therefore setting the Amount to R 1 200.
- Set the status of the Cost Estimate to Final.
- A discipline violation will be triggered, and an override may be requested.

✓ [Offset work type control](#)

Discipline Name:

Offset work types on PO must not be greater than the sum of offset work types on CEs.

Discipline Description and Example:

This discipline can be used to check Purchase Orders, in cases where the value of Offset work types on a Purchase Order is greater than the sum of Offset work types on Cost Estimates on the job.

- A Cost Estimate is created with an Offset work type:
 - The Offset work type @Cost value is set to R 100.
 - The Cost Estimate status is set to Final.
- A Purchase Order of R 150 is created from the Offset work type.
- Change the Purchase Order status to Checked.
- A discipline violation will be triggered, and an override may be requested.

✓ [Internal CE line item amounts to match pre-defined rate](#)

Discipline Name:

CE internal line item rate amount must always match the value defined in the Work Type settings.

Discipline Description and Example:

This discipline can be used to perform a check on Cost Estimate, in a case where the value of an internal line item is not equal to the value defined in the Work Type configuration.

- A work type was configured with a Unit Cost of R 600. For this example, Design was configured with a Unit Cost of R 600.
- Create a Cost Estimate and select the Design work type with the Unit Cost of R 600.
- Set the @Cost value to R 700.
- Set the status of the Cost Estimate to Final.
- A discipline violation will be triggered, and an override may be requested.

✓ PO amount must not be greater than related CE line cost

Discipline Name:

Related PO amount must not be greater than the job CE cost.

Discipline Description and Example:

This discipline can be used to perform a check on Purchase Orders, in cases where the related non-draft Purchase Order amount is greater than the job CE Cost.

- A Cost Estimate is created with an external line item
- The external line item @Cost value is set to R 1 000 with a markup of 10% resulting with an Amount of R 1 100.
- The Cost Estimate status is set to Final.
- A Purchase Order of R 1 200 is created from the external line item.
- Change the Purchase Order status to Checked.
- A discipline violation will be triggered, and an override may be requested.