

Understanding Approval Framework



How to search and analyze Approval Framework delivered by PeopleSoft?

Step 1 Open the Component where Approval Framework is implemented
For Example:

Favorites ▾Main Menu ▾>General Ledger ▾>Journals ▾>Journal Entry ▾>Manage Journal Approval

ORACLE®HomeWorklistMultiChannel ConsoleA

Ne

Manage GL Journal Approval

▼ Search Journals

To locate journals that require your approval (or journals that previously required your approval), edit the criteria below and click the Search button.

Business Unit

Requester

Line Business Unit

Journal ID

Journal Date From

To Journal Date

*Approval StatusApproved▼

Search

Clear

► Comments

Select All / Deselect All

Approve

Deny

Hold

Pushback

Journals

PersonalizeFindFindFirst1 of 1Last

Journal OverviewJournal Details

Select	Journal ID	Unit	Date	Line Unit	Total Debits	Total Credits	
<input type="checkbox"/>	0000000339	US007	01/28/2017	US007		\$1.00	\$1.00

Step 2 Perform ‘Shift+Ctrl+J’ to get component details

r ▾> Journals ▾> Journal Entry ▾> Manage Journal Approval	
HomeWorklist	
Browser	FIREFOX/51.0
Operating System	WIN7
Browser Compression	ON (gzip)
Tools Release	8.54
Application Release	Financials/SCM 9.20.00.000
Service Pack	0
Page	JOURNAL_APPROVAL_M
Component	JOURNAL_APPROVAL_M
Menu	PROCESS_JOURNALS
User ID	VP1
Database Name	FSCM92
Database Type	ORACLE
Application Server	//User-PC:9000
Component Buffer Size (KB)	11

PeopleSoft Tutorial

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Step 3 Go to following navigation and search for similar Process Id as Component name:

Navigation: Main Menu > Enterprise Components > Approvals > Approvals > Approval Process Setup

ORACLE Home

Setup Process Definitions

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Process ID: contains

Definition ID: begins with

Effective Date: =

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-14 of 14 Last

Process ID	Definition ID	Effective Date	Priority	Status as of Effective Date
GLJournalApproval	GLActualDemo	01/01/1900	1	Inactive
GLJournalApproval	GLActual_Others	01/01/1900	2	Inactive

Step 4 Open the link from Search results having most recent Effective date and Status as 'Active'.

Click on the links below highlighted in red to analyze various design options.

Note down the Approval User List highlighted in green.

Setup Process Definitions

[Clone Approval Process](#) [Approval Process Viewer](#) [Preview Approval Process](#)

Process ID GLJournalApproval
Definition ID Test Main
Effective Date 01/28/2017
Description Test Main

Definition Options

[Definition Criteria](#) [Alert Criteria](#) [Definition Notifications](#) [Timeout Options](#)

*Admin Role ☒ Default Process Definition

*Status ☐ User Auto Approval

Priority ☐ Route to Requester

☒ Include Requester

Stages Find | View All First 1 of 1 Last

*Stage Number Description Level

Paths Find | View All First 1 of 1 Last

Description *Source [Details](#) [Criteria](#)

Steps Personalize | Find | View All First 1 of 1 Last

Description	Approver User List	Details	Criteria
1 Step 1	Z_EXPENSE_ADMIN		

How to search and analyze Approval Framework delivered by PeopleSoft?



Step 3 Go to below navigation and search for required User list.
Analyze User List Source and Route Control Attributes.

Favorites ▾

Main Menu ▾ > Enterprise Components ▾ > Approvals ▾ > Approvals ▾ > User List Setup

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User List Definition

User List Z_EXPENSE_ADMIN

*Description Z_EXPENSE_ADMIN

User List Source

☒ Role

Role Name ADMINISTRATOR

☐ SQL Definition

☐ Query

☐ Application Class

Route Control Attributes

Route Control Profile

Record Name

Personalize | Find |

First 1 of 1 Last

Route Control Type	Field Name
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