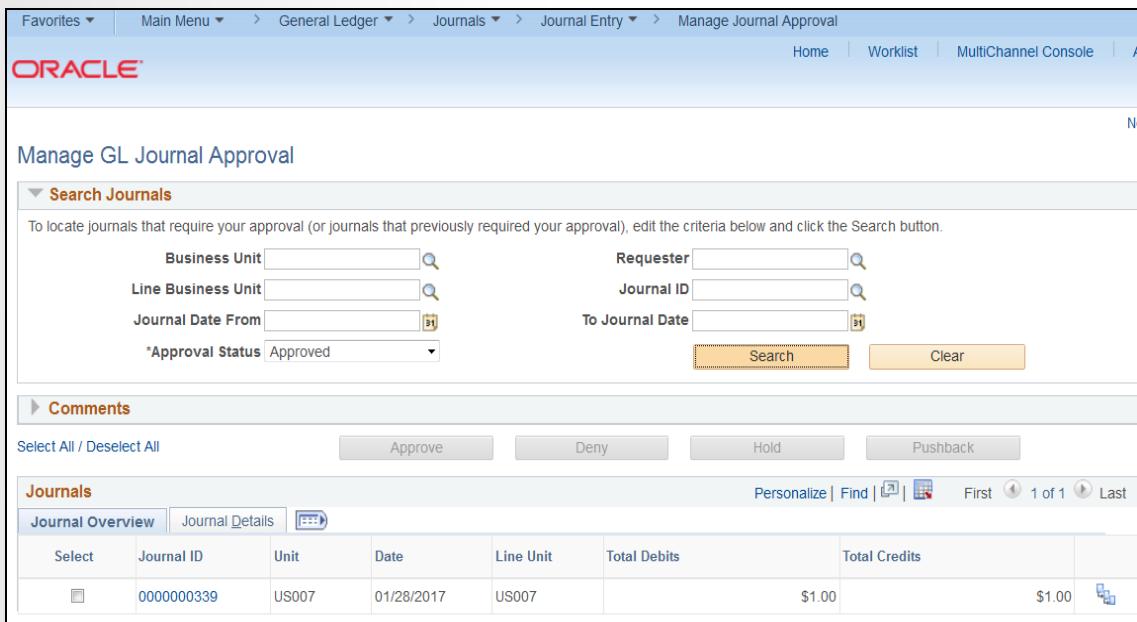


Understanding Approval Framework



How to search and analyze Approval Framework delivered by PeopleSoft?

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



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 | <input type="text"/> | Requester | <input type="text"/> |
| Line Business Unit | <input type="text"/> | Journal ID | <input type="text"/> |
| Journal Date From | <input type="text"/> | To Journal Date | <input type="text"/> |
| *Approval Status | Approved | <input type="button" value="Search"/> | <input type="button" value="Clear"/> |

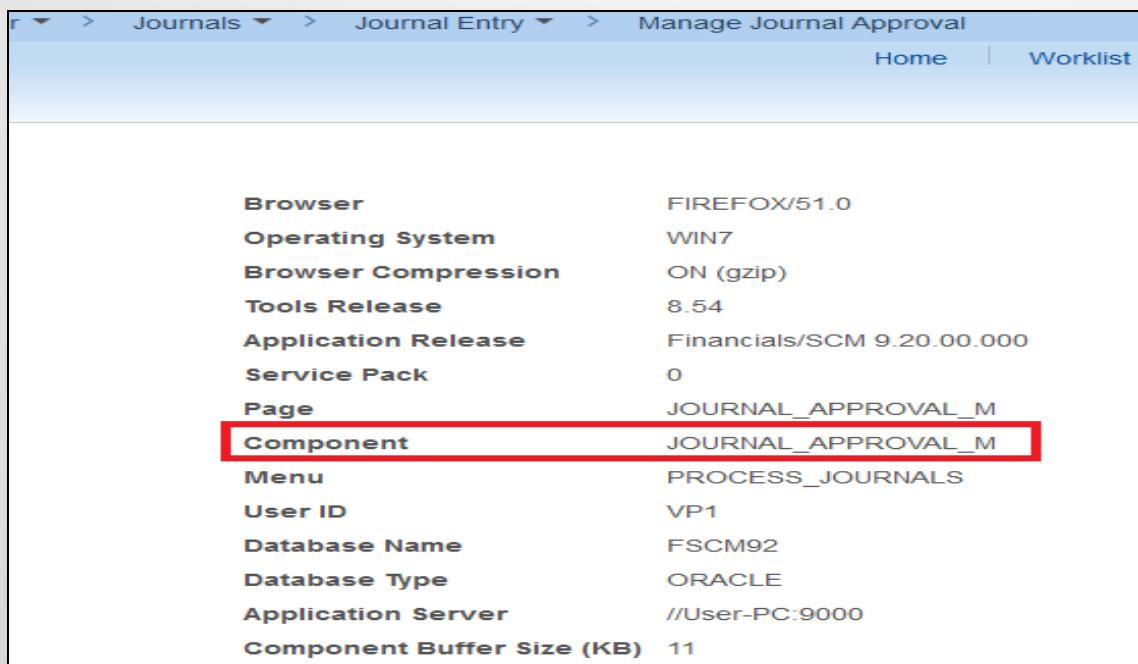
Comments

Select All / Deselect All

Journals

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

Step 2 Perform 'Shift+Ctrl+J' to get component details



| | |
|----------------------------|----------------------------|
| 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 |

How to search and analyze Approval Framework delivered by PeopleSoft?



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

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 Journal

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: ADMINISTRATOR Default Process Definition

*Status: Active User Auto Approval

Priority: 1 Route to Requester

Include Requester

Stages

*Stage Number: 10 Description: Stage 1 Level: Header

Paths

Description: Path 1 *Source: Static Details Criteria

Steps

Description: Step 1 Approver User List: Z_EXPENSE_ADMIN Details Criteria

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

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 |
|--------------------|------------|
| | |