Electronic Forms

Training Guide
PeopleSoft Finance 9.2 | June 2020

Electronic Forms

Electronic Forms Introduction

Electronic forms are available for ease of use within PeopleSoft Finance. They are mobile in nature and allow for effective processing and approval workflow. Completing a form allows for auditable electronic documentation as well as automated system updates to take place on corresponding PeopleSoft pages.

Available forms are grouped together based on function and audience. They may be found in the appropriate navigation collection or in the myForms WorkCenter. Separate pages (add, approve, update, and view) are available based on the form action being performed. Details about each page are listed in the corresponding section of this document.

Accessing Forms through Navigation Collections

Forms are made available inside various Navigation Collections. A Navigation Collection may be accessed by clicking on the appropriate tile and group. Some of the tiles that house electronic forms are listed below.

- Billing
- General Ledger
- Receivables
- Travel and Expenses

Status Definitions

During its lifecycle, a form may take on several statuses. The following is a basic definition of each status type.

- Saved – A form has been started by the initiator but not been submitted.
- Pending – A form has been submitted or re-submitted into the approval workflow and has not been approved at any step.
- Recycled – A form that has been sent back from an approver to the initiator for corrections.
- Partially Approved – A form that has been submitted into the approval workflow and approved by at least one approver.
- Executed – A form has been submitted, fully approved, and completed any updates to corresponding PeopleSoft pages.
- In Error – An error occurred when the form tried to update corresponding PeopleSoft pages.
- On Hold – A form has been put on hold by an approver. The form has not yet been approved.
- Denied – The form has been denied by an approver and may not be re-submitted.
- Withdrawn – A form may be withdrawn by the initiator if it should not be submitted or approved.

Add a New Form

The Add page opens when a new form is started. It does not contain saved information, and allows users to create a brand new form. Once created, the form may be submitted into workflow, or in some but not all cases, saved for later submission.

Add pages are located inside various Navigation Collections.
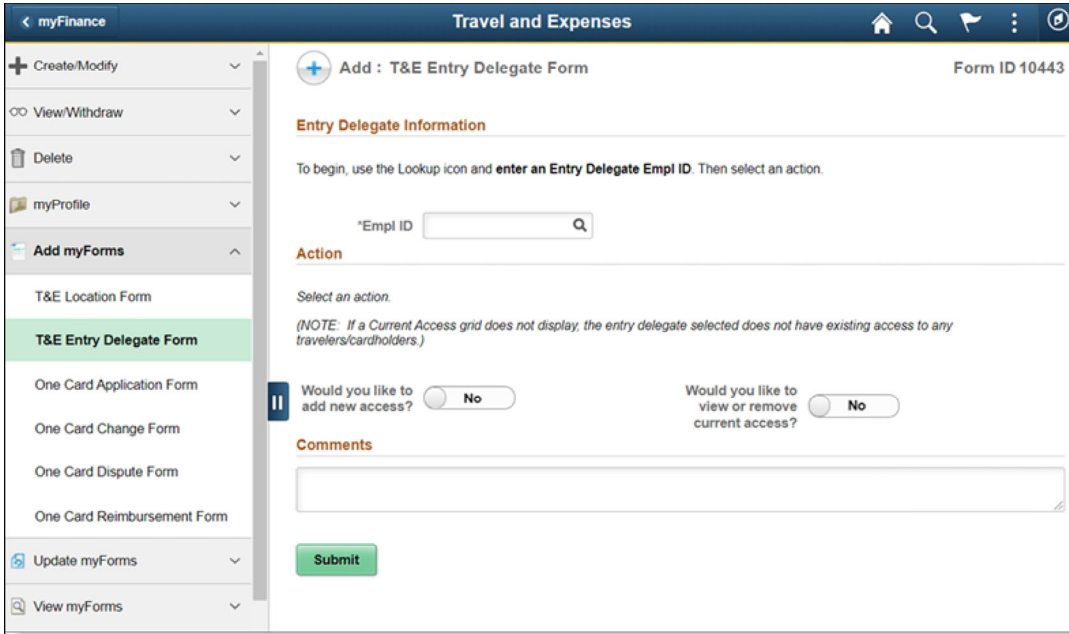
END OF PROCEDURE.
You have successfully reviewed this topic.


Approve a Form

All form approvals are located inside the Approvals tile. Forms will route there if the form has been submitted for approval and if approvals are required.

1. Log in to myFinance to access the pending myForm approvals.

    The Approvals tile displays the total number of pending approvals for all applicable documents (forms, expense reports, travel authorizations, cash advances, requisitions, and vouchers) in its lower right corner. If no pending approvals are available, the tile will display 0. For details on the Approval tile and its basic functionality, refer to the Mobile Approvals training guide.

2. **Click the Approvals tile. The Pending Approvals page opens.**
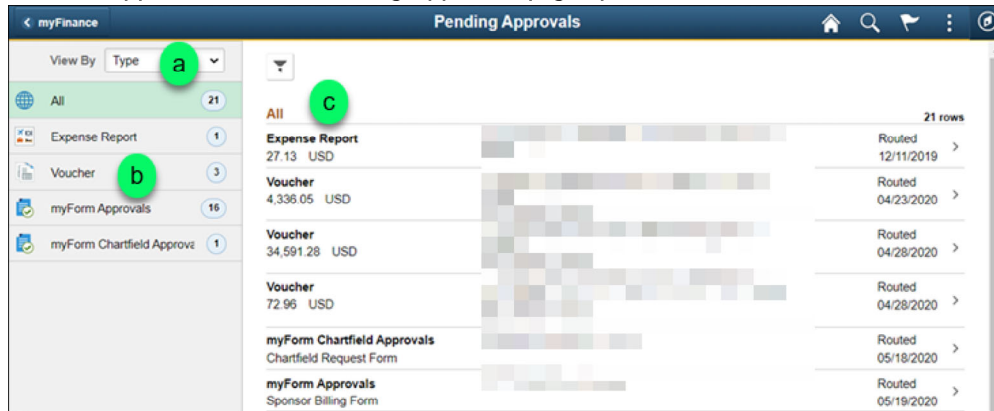
a. The left menu panel defaults to Type in the View By field, and only lists categories that have pending approvals. Two of the transaction categories available for electronic forms are myForm Approvals and myForm Chartfield Approvals.
b. The number of pending approvals for each category is displayed on the right side of its button.
c. The right content panel lists All pending approval types by default.
d. Click a category button on the left side of the page; the right will filter out all pending approvals except the transactions that belong to the selected category.
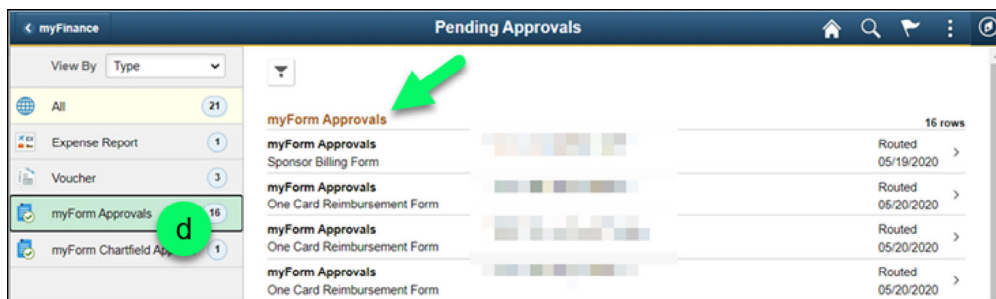
e. Click anywhere in the row to view the Form Page for the selected transaction.
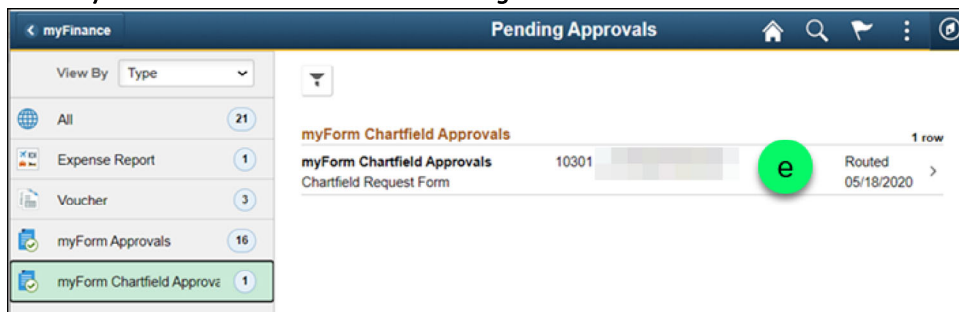
Approval Action (Form Page)

Actions available to the form approver, including the Aprove button, are located at the bottom of the form. A description of each button's action are listed below:

a. **Deny** – Select this action to permanently end the form processing. The form will be archived and cannot be resubmitted.
b. **Recycle** – Select this action to send the form back to the initiator (user who originally submitted the form) for changes.
c. **Hold** – Select this action to put the form on hold. When a document is on hold it may not be updated by the form initiator or approved by a different approver.
d. **Approve** – Select to approve the form and if applicable, send it to the next approver for evaluation.

END OF PROCEDURE.
You have successfully completed this topic.

Update a Form

Update pages are used when a form that has already been started needs to be opened for changes. You may use the Update Form Page to make changes to a form that has previously been saved, or submitted but not approved, or to correct a form that has been sent back to the initiator.

After updating a form, users should scroll to the bottom of the page. Depending on the form's current status, their options are:

- Save – Select this option to save changes that have just been made to the form.
- Withdraw – Select this option to completely stop the form. It will no longer be available for future submission or approval.
- Resubmit – If a form has been submitted but has not yet gained one approval updates may be resubmitted into the approval workflow.
- Submit – If the form has been saved previously and never submitted, a user may select this button to submit the form into the approval workflow.

END OF PROCEDURE.
You have successfully viewed this topic.

View a Form

The View page allows users to see a form no matter its status. It may be used to reference forms from a historical perspective. View forms may be located inside the forms corresponding navigation collection or inside the myForms WorkCenter.

Procedure

The following procedure demonstrates how to view a previously submitted Chartfield Request Form.

1. Navigate to the General Ledger tile and locate the General Ledger Design group.
2. Click the View Chartfield Request Form page.
3. The Search page opens. Use the fields on the Search page to enter search criteria for the desired form.

Note: Not all search records will be applicable for each form. Please search only with criteria related to the form.

4. For example, type UMSYS in the Business Unit field to limit search results to forms in that business unit. Then click the Search button.

5. The results are listed below the search fields. Click the desired result to view the form.

6. After viewing the form, click the Search button to return to the original search result. Click the Next button to view form execution and approval history.

END OF PROCEDURE.
You have successfully reviewed this topic.
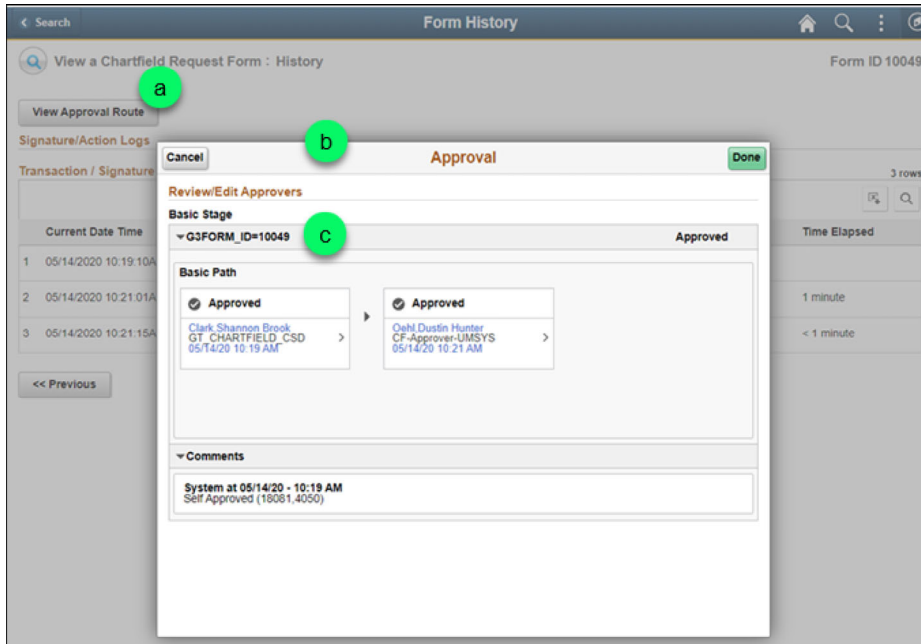

Approval Workflow

Some forms require approval upon submission. To view the details of an approval workflow, click the form's View page.

View Approval Workflow Procedure

1. Search for a form.
   You may refer to the View a Form topic for instructions.
2. When the form opens, click the Next button located at the bottom of the Form page.
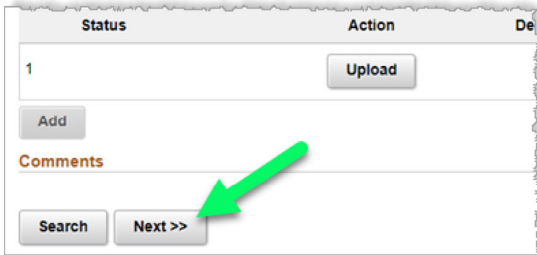
3. The Form History page opens.

   a. Click the View Approval Route button that will be visible in the upper left area of the page.
   b. The Approval dialog window appears, allowing you to reference the selected form's specific approval routing requirements.
   c. On form 10049, routing details can be viewed by expanding the Basic Stage (G3FORM_ID=10049) section.
4. The Transaction/Signature Log contains a timestamped record of each action taken on the form.
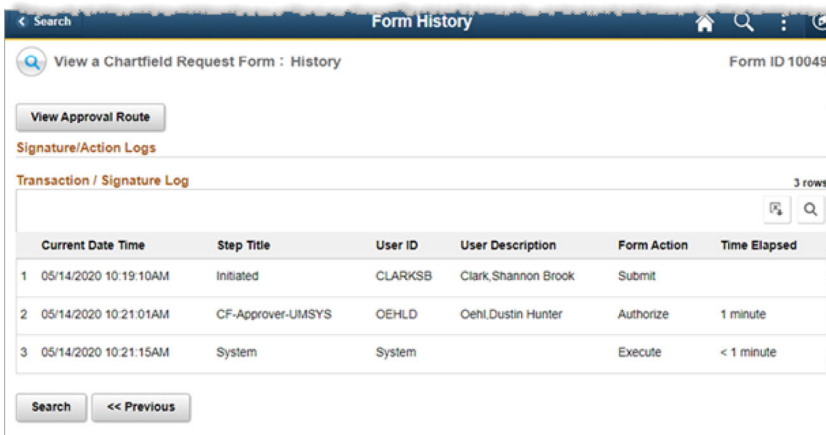
END OF PROCEDURE.
You have successfully reviewed this topic.

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myForms WorkCenter

Navigation Options
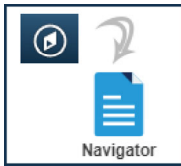
NavBar:Navigator: Main Menu > myForms WorkCenter

Description

The myForms WorkCenter is a secondary location where all electronic forms are grouped together based on function and audience. Add, update, and view links are available inside the WorkCenter. *Note: The Approvals tile must be used to approve a form*.

The WorkCenter contains a pagelet titled Reporting that is available to all users. A report titled My eForms allows one to easily see all forms initiated by their own user ID. The report is filterable by Form Type and Form Status.

END OF PROCEDURE.
You have successfully reviewed this topic.

THIS CONCLUDES THE TRAINING ON
ELECTRONIC FORMS