Approving Finance & SCM eForms
Quick Reference Guide

Effective December 21, 2023

Approving Finance & SCM eForms

Purpose: This quick reference guide is on how to approve Finance & SCM eForms in the PeopleSoft fluid user interface.

Finance is moving away from using PDF forms to request items (e.g. invoices, journal transfers, and delegation) to electronic forms or eForms.

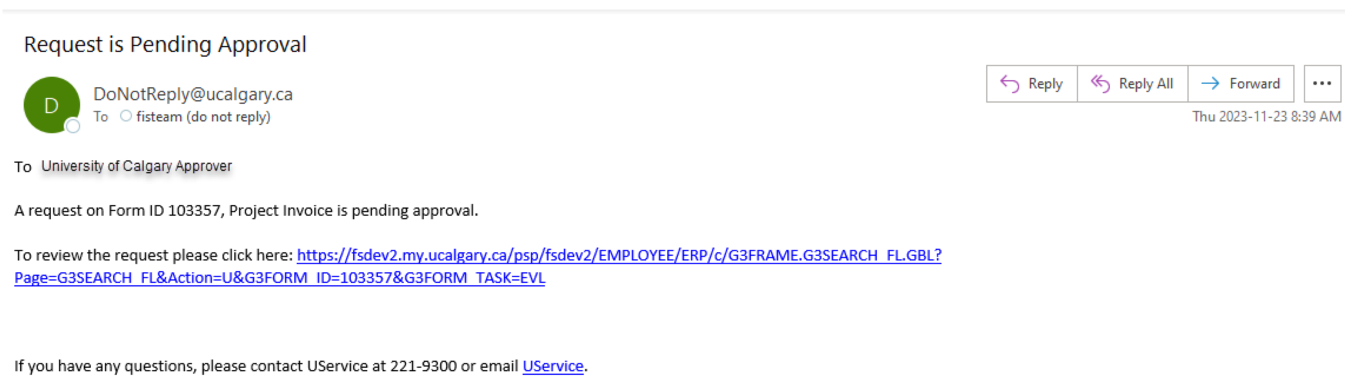
Audience: All University of Calgary users who approve requests for data to be added or modified in PeopleSoft FSCM (Finance and Supply Chain Management).

Approving an eForm

There are multiple ways to approve a Finance & SCM eForm.

1. **From the Notification email sent to an Approver**

Click on the link contained in the email entitled "Request is Pending Approval" from DoNotReply@ucalgary.ca.


Request is Pending Approval

DoNotReply@ucalgary.ca
To fisteam (do not reply)

Reply | Reply All | Forward | ...
Thu 2023-11-23 8:39 AM

To University of Calgary Approver

A request on Form ID 103357, Project Invoice is pending approval.

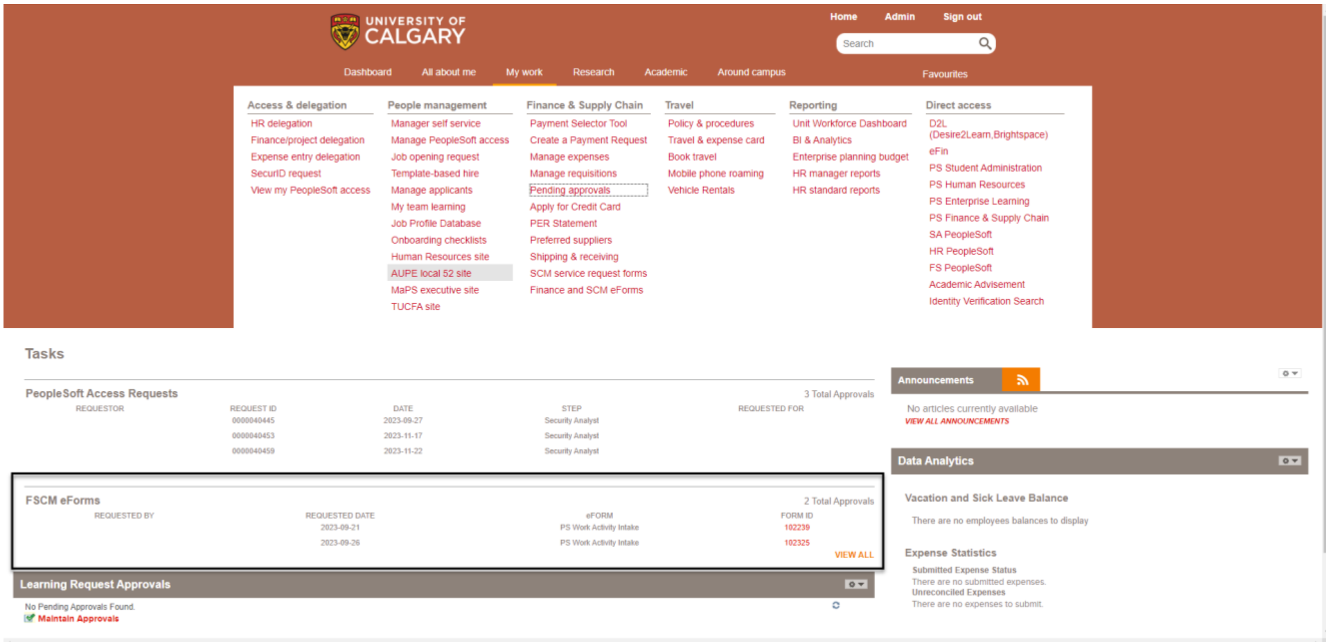
To review the request please click here: https://fsdev2.my.ucalgary.ca/psp/fsdev2/EMPLOYEE/ERP/c/G3FRAME.G3SEARCH_FL.GBL?Page=G3SEARCH_FL&Action=U&G3FORM_ID=103357&G3FORM_TASK=EVL

If you have any questions, please contact UService at 221-9300 or email UService.

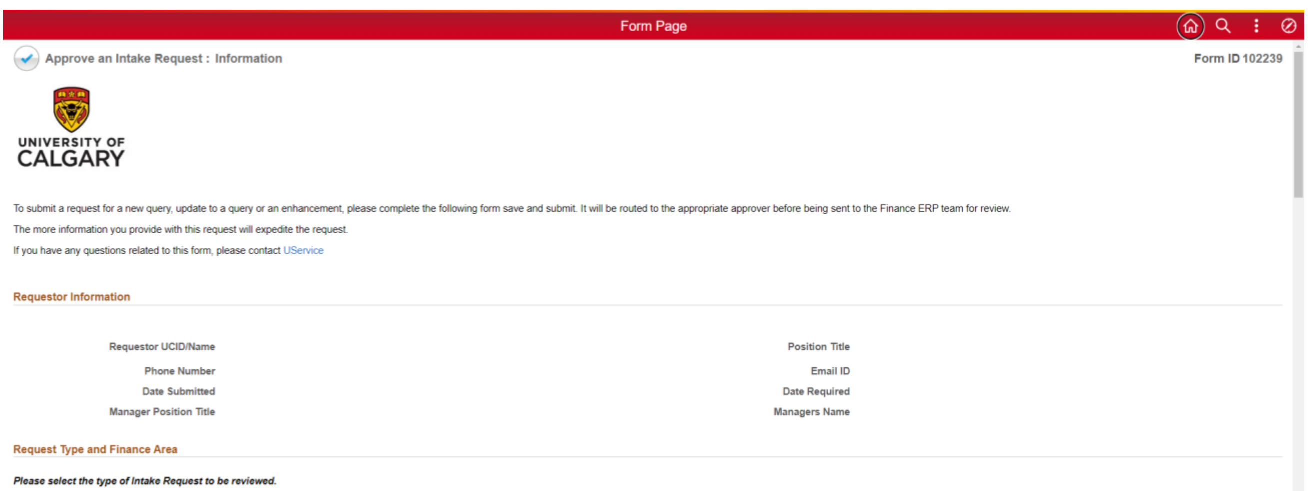
2. **Using the Task List on the Dashboard**

There will be a section titled FSCM eForms on the dashboard that will populate a list of eForms that are Pending and need to be reviewed.

Depending on how many tasks a user has available to them, they may need to scroll down to the FSCM eForms task section.



Clicking on the Form ID link will take the user right to the eForm, where it can be reviewed and actioned.



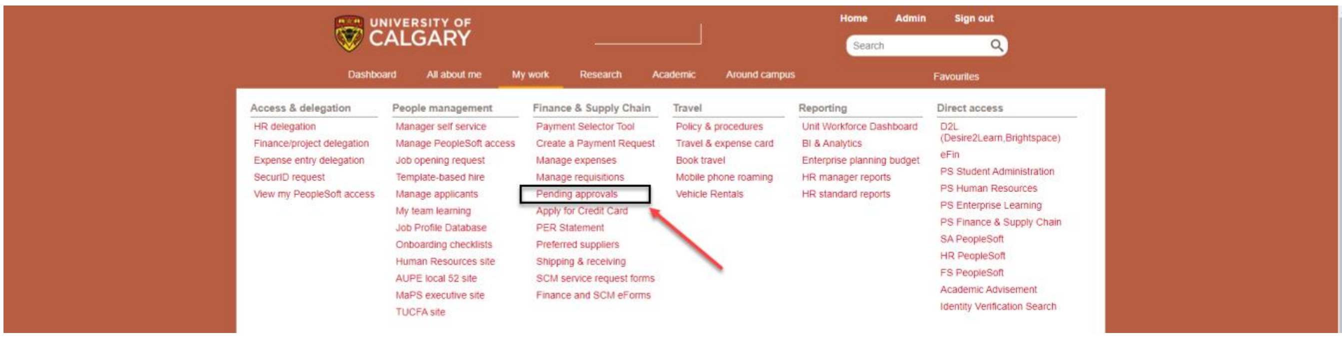
When an eForm has been actioned, click on the Home icon  at top right hand corner of the screen to go to Employee Self Service Homepage.

Click the MyUCalgary – Projects tab 

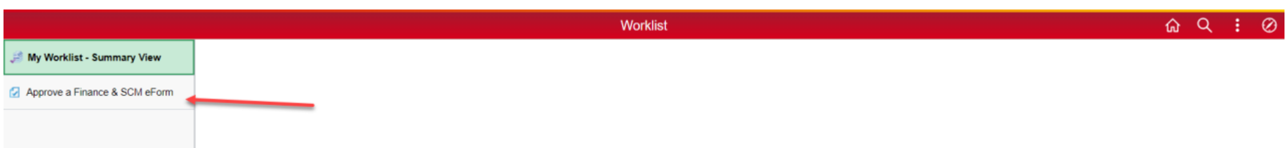
to return to the Portal Dashboard.

3. From the Pending Approvals link found in the My Work section on the Dashboard

Login to the University of Calgary portal – my.ucalgary.ca

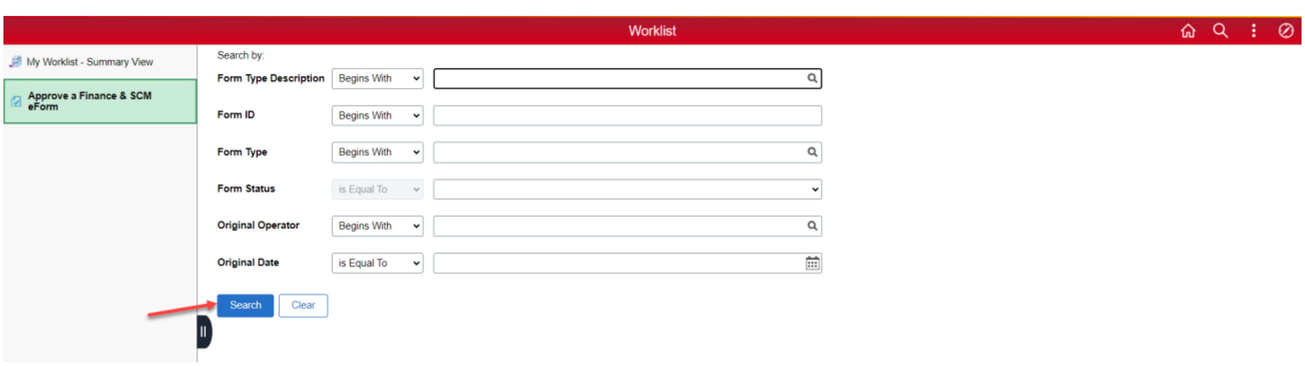


Click on "Pending Approvals" and it will take you to the eForm request area for approvals.



Click on the folder Approve a Finance & SCM eForm and a search page will appear.

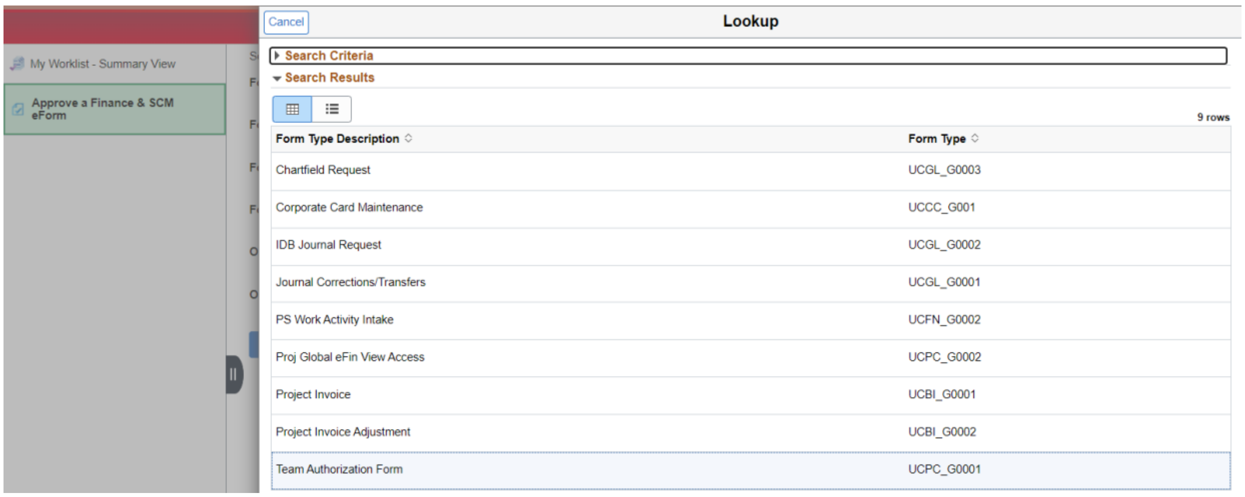
Click **Search** to bring up all the requests with Pending Status that an approver needs to review and action.



Once on the Search page, you can also define more parameters to refine the search.

Form Type Description: There are several types of forms, descriptions of which can be found within the magnifying glass next to Form Type. Form types include things like Project Invoice, Journal Corrections/Transfers and Team Authorization forms.

Form ID: The Identification Number assigned to the request when it was created.

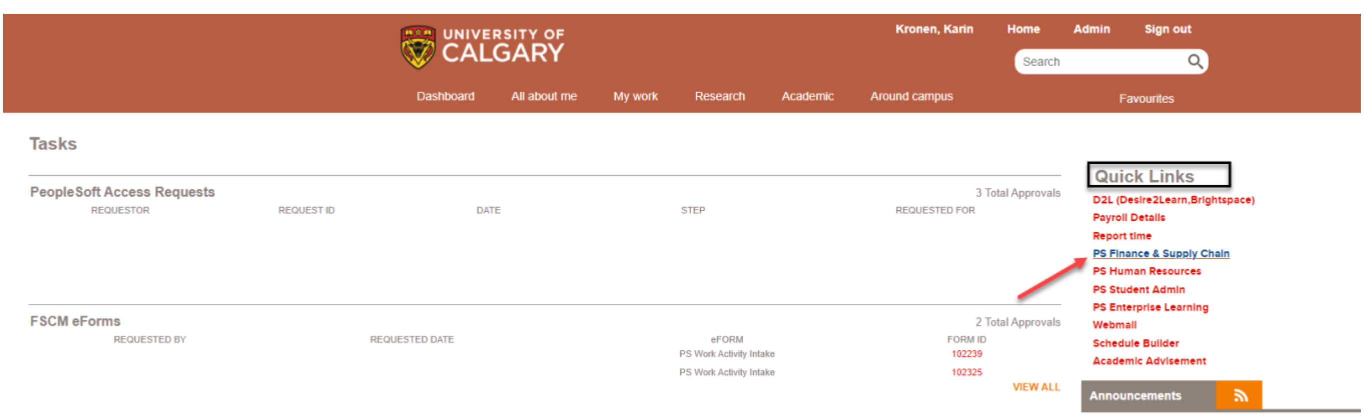


Original Operator: The UCID of the person who submitted the eForm.

Original Date: The date the eForm was submitted.

4. Click on the Finance & SCM eForms tile on the Employee Self Service Homepage

After logging into PeopleSoft, using my.ucalgary.ca, click on the quick link that shows PS Finance & Supply Chain from the Dashboard



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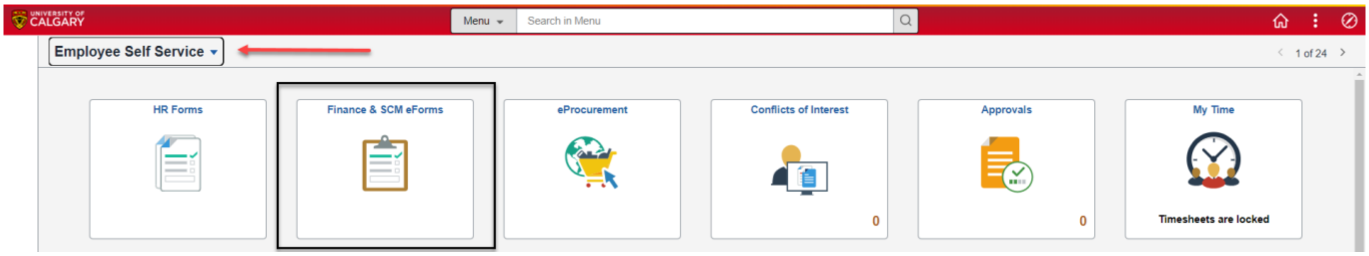
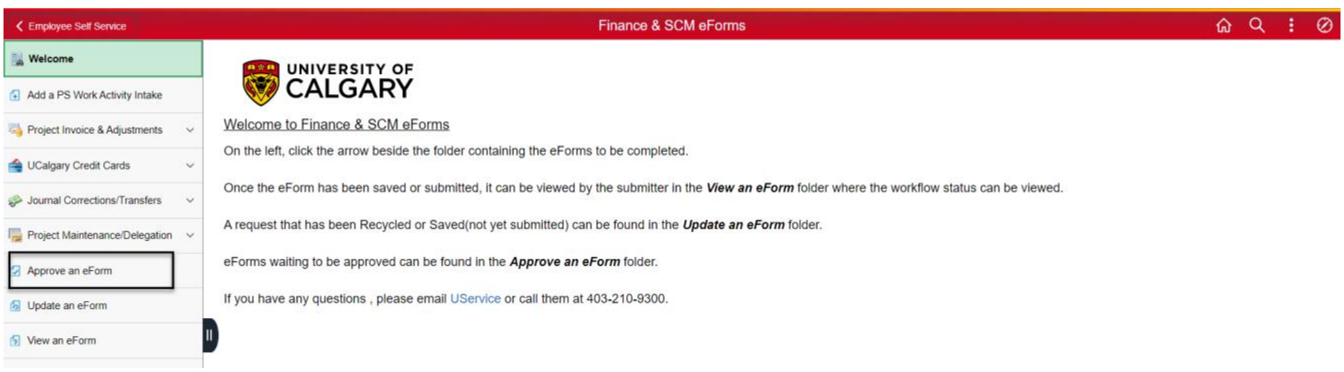
On the Employee Self Service Homepage, the Finance & SCM eForms functional tile takes you to the Navigation Collection for eForms.



Click on the **Approve an eForm folder** from the list on the left-hand side

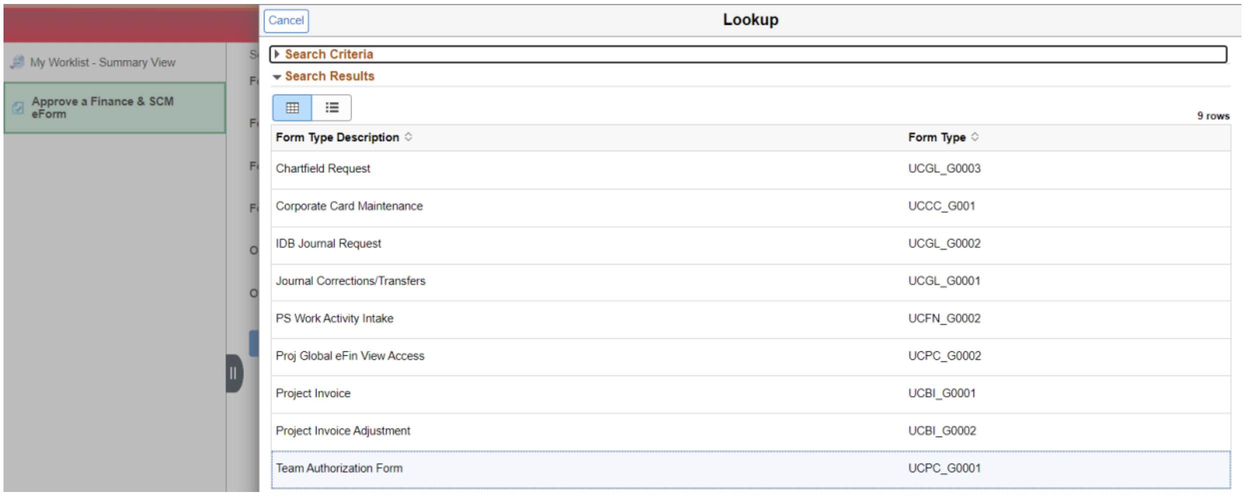


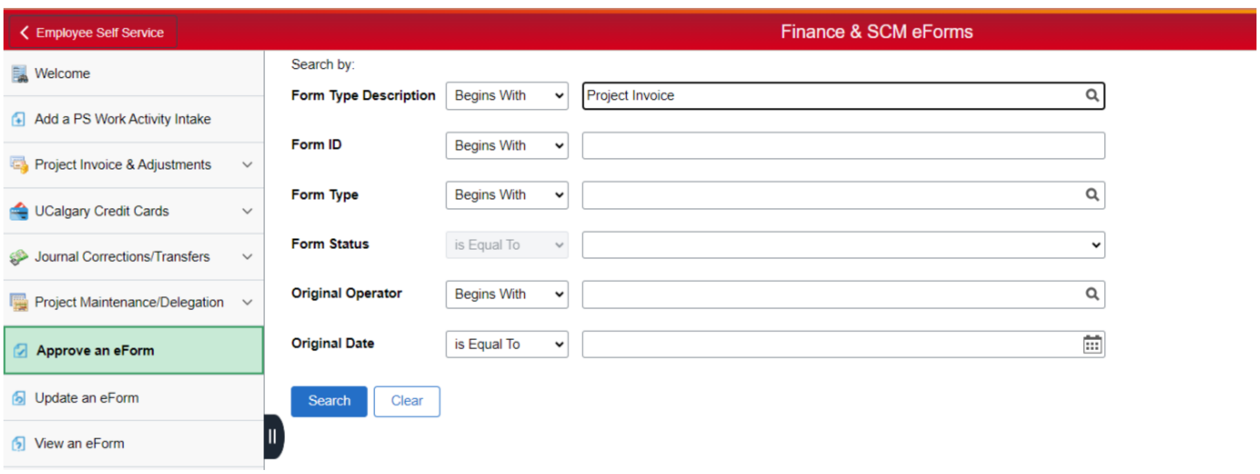
This folder is where eForms that need to be approved will be located. When clicked, a Search page will appear.

Click **Search** to see all requests with a Pending status that need to be reviewed and actioned.

Or

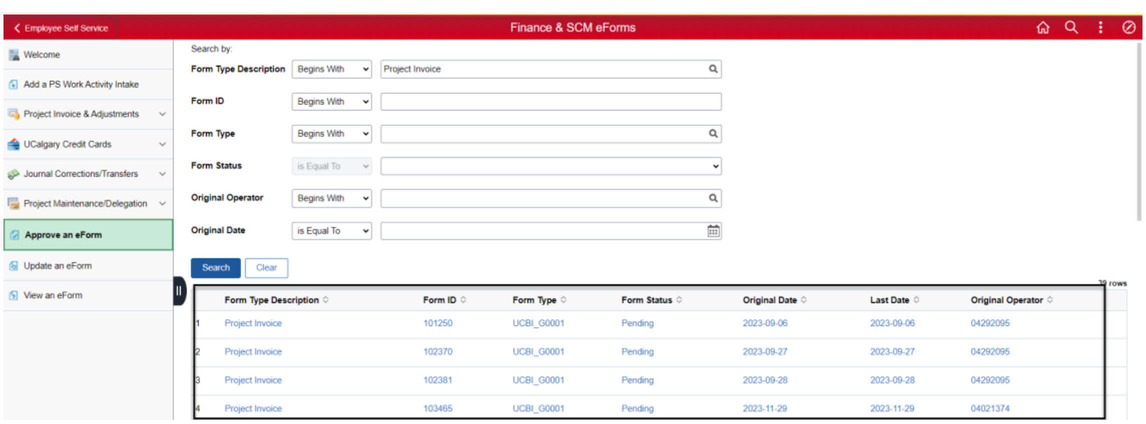
Enter any of the Search parameters, only approvers will see the eForms that have been assigned to them.
If the Form ID is known, enter it to pull up the specific eForm, or click the magnifying glass next to the Form Type Description to find the type of eForm required.

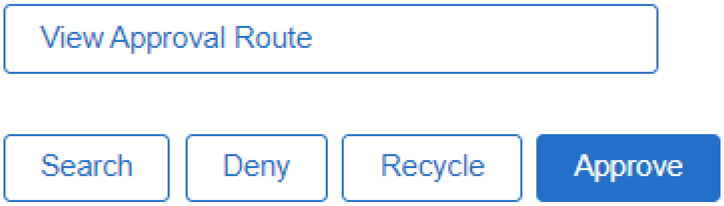




Click Search

Click on any of the results to access the eForm that needs to be approved.
After an eForm is reviewed, it can be Denied, Recycled, or Approved





Deny: The request cannot move forward, and a new request will need to be created.

Recycle: Sends the eForm back to the original submitter for changes.

Approve: The request is moved to the next workflow step, or it is authorized and sent to PeopleSoft (to be executed)