

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)

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](#).

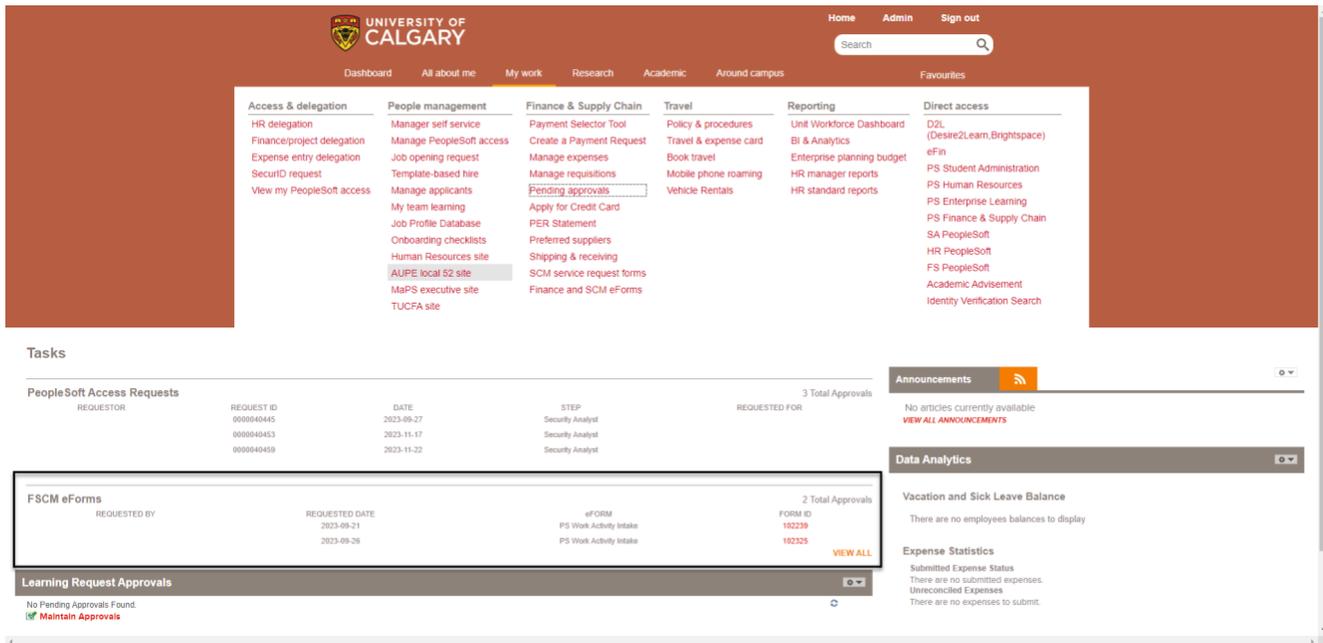
Thu 2023-11-23 8:39 AM

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.

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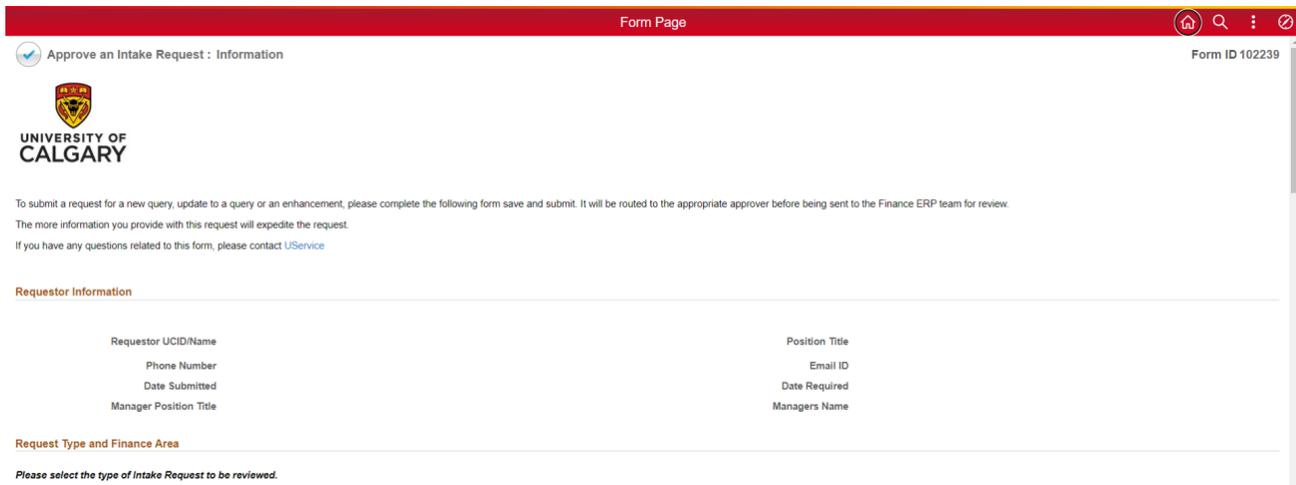


The screenshot shows the University of Calgary portal dashboard. At the top, there is a navigation bar with 'Home', 'Admin', and 'Sign out' links, along with a search bar. Below this is a secondary navigation bar with 'Dashboard', 'All about me', 'My work', 'Research', 'Academic', 'Around campus', and 'Favourites'. The main content area is divided into several sections:

- Access & delegation:** HR delegation, Finance/project delegation, Expense entry delegation, SecurID request, View my PeopleSoft access.
- People management:** Manager self service, Manage PeopleSoft access, Job opening request, Template-based hire, Manage applicants, My team learning, Job Profile Database, Onboarding checklists, Human Resources site, **AUPE local 52 site**, MaPS executive site, TUCFA site.
- Finance & Supply Chain:** Payment Selector Tool, Create a Payment Request, Manage expenses, Manage requisitions, **Pending approvals**, Apply for Credit Card, PER Statement, Preferred suppliers, Shipping & receiving, SCM service request forms, Finance and SCM eForms.
- Travel:** Policy & procedures, Travel & expense card, Book travel, Mobile phone roaming, Vehicle Rentals.
- Reporting:** Unit Workforce Dashboard, BI & Analytics, Enterprise planning budget, HR manager reports, HR standard reports.
- Direct access:** D2L (Desire2Learn Brightspace), eFin, PS Student Administration, PS Human Resources, PS Enterprise Learning, PS Finance & Supply Chain, SA PeopleSoft, HR PeopleSoft, FS PeopleSoft, Academic Advisement, Identity Verification Search.

Below the navigation is a 'Tasks' section with a table for 'PeopleSoft Access Requests' and a table for 'FSCM eForms'. The 'FSCM eForms' table has a 'VIEW ALL' link highlighted. To the right, there are sections for 'Announcements', 'Data Analytics', 'Vacation and Sick Leave Balance', and 'Expense Statistics'.

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



The screenshot shows the 'Form Page' for 'Approve an Intake Request : Information'. The page header includes 'Form Page', a home icon, a search icon, and a refresh icon. The form ID is 'Form ID 102239'. The main content area contains the University of Calgary logo and instructions: 'To submit a request for a new query, update to a query or an enhancement, please complete the following form save and submit. It will be routed to the appropriate approver before being sent to the Finance ERP team for review. The more information you provide with this request will expedite the request. If you have any questions related to this form, please contact UService'. Below this is a 'Requestor Information' section with fields for Requestor UCID/Name, Position Title, Phone Number, Email ID, Date Submitted, Date Required, and Manager Position Title/Managers Name. A 'Request Type and Finance Area' section follows with the instruction: 'Please select the type of Intake Request to be reviewed.'

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



The screenshot shows a browser tab titled 'MyUCalgary - Projects' with a close button (X) on the right.

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.ualgary.ca



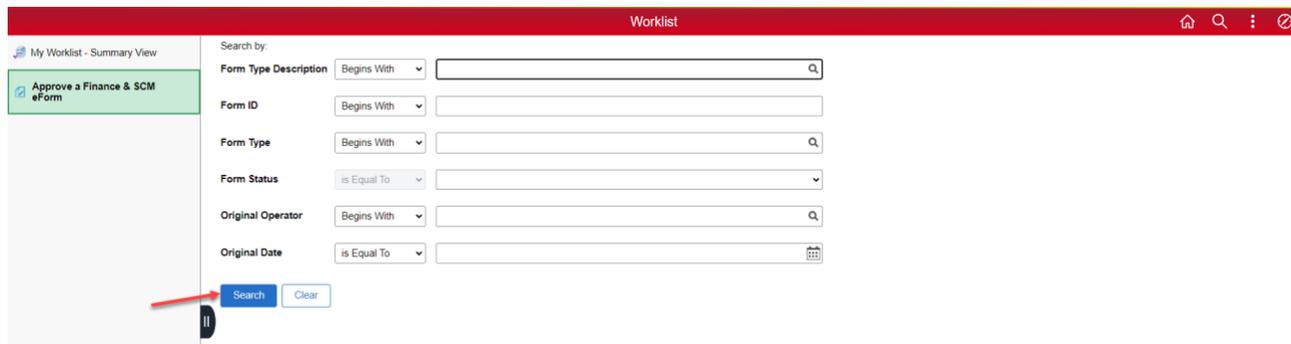
Click on “Pending Approvals” and it will take you to the eForm request area for approvals.



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.



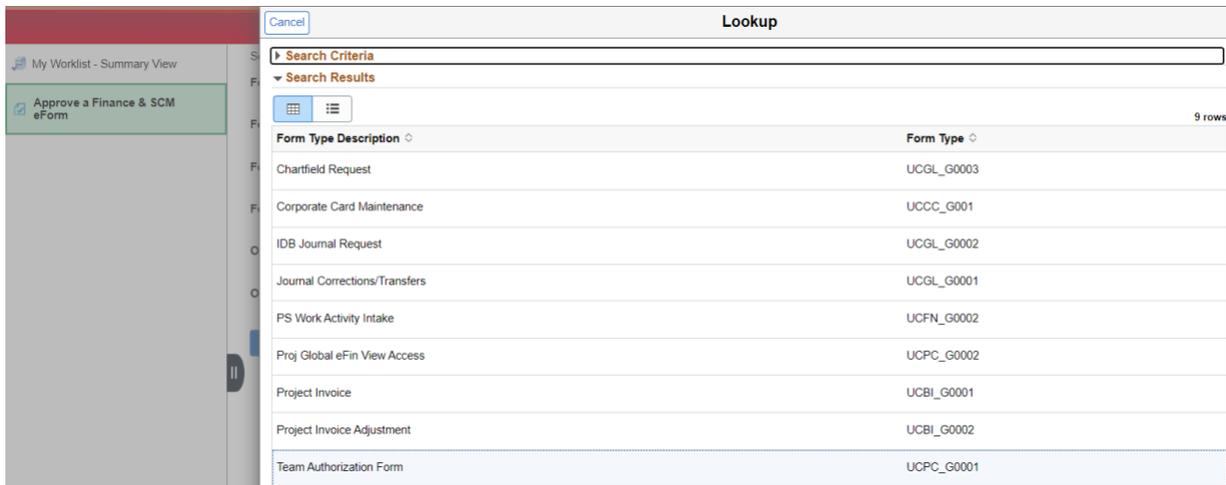
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Once on the Search page, you can also define more parameters to refine the search.

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.



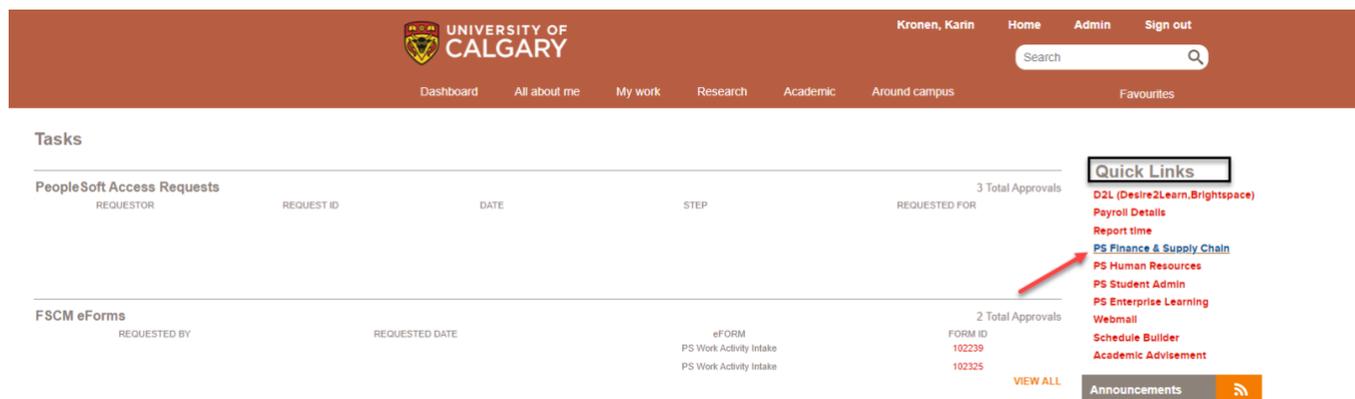
Form Type Description	Form Type
Chartfield Request	UCGL_G0003
Corporate Card Maintenance	UCCC_G001
IDB Journal Request	UCGL_G0002
Journal Corrections/Transfers	UCGL_G0001
PS Work Activity Intake	UCFN_G0002
Proj Global eFin View Access	UCPC_G0002
Project Invoice	UCBI_G0001
Project Invoice Adjustment	UCBI_G0002
Team Authorization Form	UCPC_G0001

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



The screenshot shows the Employee Self Service Homepage with a navigation bar at the top containing the University of Calgary logo, user name 'Kronen, Karin', and links for 'Home', 'Admin', and 'Sign out'. Below the navigation bar are several menu items: 'Dashboard', 'All about me', 'My work', 'Research', 'Academic', 'Around campus', and 'Favourites'. A search bar is also present. The main content area is divided into 'Tasks' and 'Quick Links'. The 'Tasks' section includes 'PeopleSoft Access Requests' (3 Total Approvals) and 'FSCM eForms' (2 Total Approvals). The 'Quick Links' section contains several links, with a red arrow pointing to 'PS Finance & Supply Chain'. Other links include 'D2L (Desire2Learn.Brightspace)', 'Payroll Details', 'Report time', 'PS Human Resources', 'PS Student Admin', 'PS Enterprise Learning', 'Webmail', 'Schedule Builder', and 'Academic Advisement'. An 'Announcements' section is visible at the bottom right.

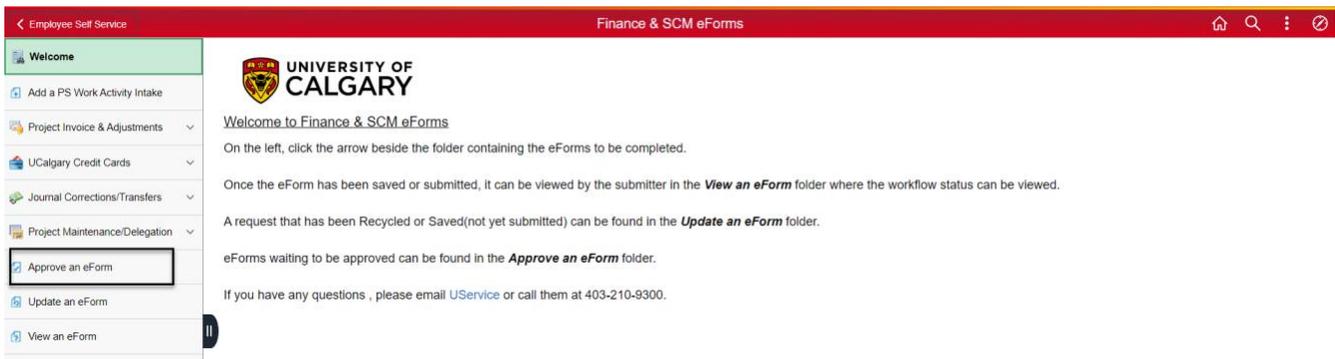
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On the Employee Self Service Homepage, the Finance & SCM eForms functional tile takes you to the Navigation Collection for eForms.



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.

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Cancel Lookup

Search Criteria

Search Results

9 rows

Form Type Description	Form Type
Chartfield Request	UCGL_G0003
Corporate Card Maintenance	UCCC_G001
IDB Journal Request	UCGL_G0002
Journal Corrections/Transfers	UCGL_G0001
PS Work Activity Intake	UCFN_G0002
Proj Global eFin View Access	UCPC_G0002
Project Invoice	UCBI_G0001
Project Invoice Adjustment	UCBI_G0002
Team Authorization Form	UCPC_G0001

Employee Self Service Finance & SCM eForms

Welcome

- Add a PS Work Activity Intake
- Project Invoice & Adjustments
- UCalgary Credit Cards
- Journal Corrections/Transfers
- Project Maintenance/Delegation
- Approve an eForm**
- Update an eForm
- View an eForm

Search by:

Form Type Description: Begins With

Form ID: Begins With

Form Type: Begins With

Form Status: is Equal To

Original Operator: Begins With

Original Date: is Equal To

Search Clear

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

Employee Self Service Finance & SCM eForms

Welcome

- Add a PS Work Activity Intake
- Project Invoice & Adjustments
- UCalgary Credit Cards
- Journal Corrections/Transfers
- Project Maintenance/Delegation
- Approve an eForm**
- Update an eForm
- View an eForm

Search by:

Form Type Description: Begins With

Form ID: Begins With

Form Type: Begins With

Form Status: is Equal To

Original Operator: Begins With

Original Date: is Equal To

Search Clear

	Form Type Description	Form ID	Form Type	Form Status	Original Date	Last Date	Original Operator
1	Project Invoice	101250	UCBI_G0001	Pending	2023-09-06	2023-09-06	04292095
2	Project Invoice	102370	UCBI_G0001	Pending	2023-09-27	2023-09-27	04292095
3	Project Invoice	102381	UCBI_G0001	Pending	2023-09-28	2023-09-28	04292095
4	Project Invoice	103465	UCBI_G0001	Pending	2023-11-29	2023-11-29	04021374

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[View Approval Route](#)

[Search](#)

[Deny](#)

[Recycle](#)

[Approve](#)

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)