

Effective January 30, 2025

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.

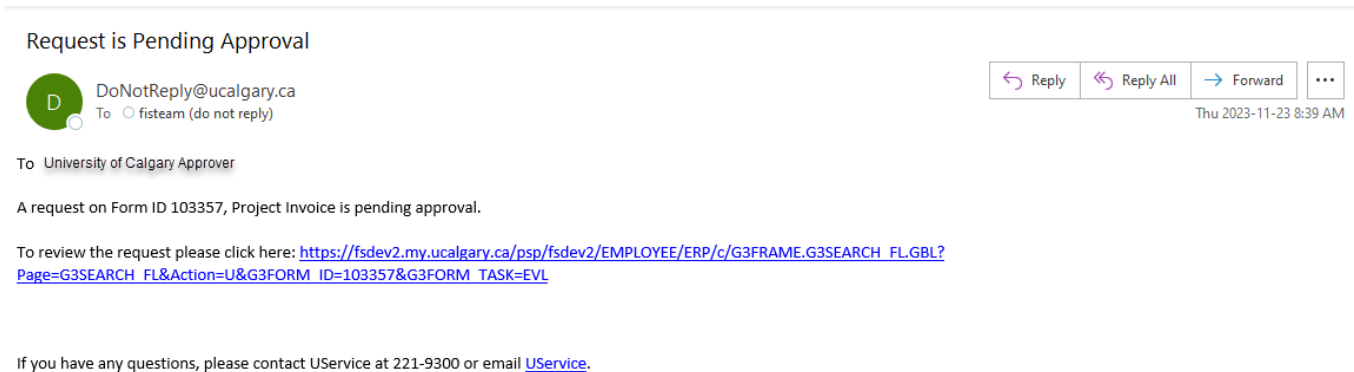
Audience: All University of Calgary users who approve requests for data to be added or modified in PeopleSoft FSCM (Finance and Supply Chain Management)

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](#).

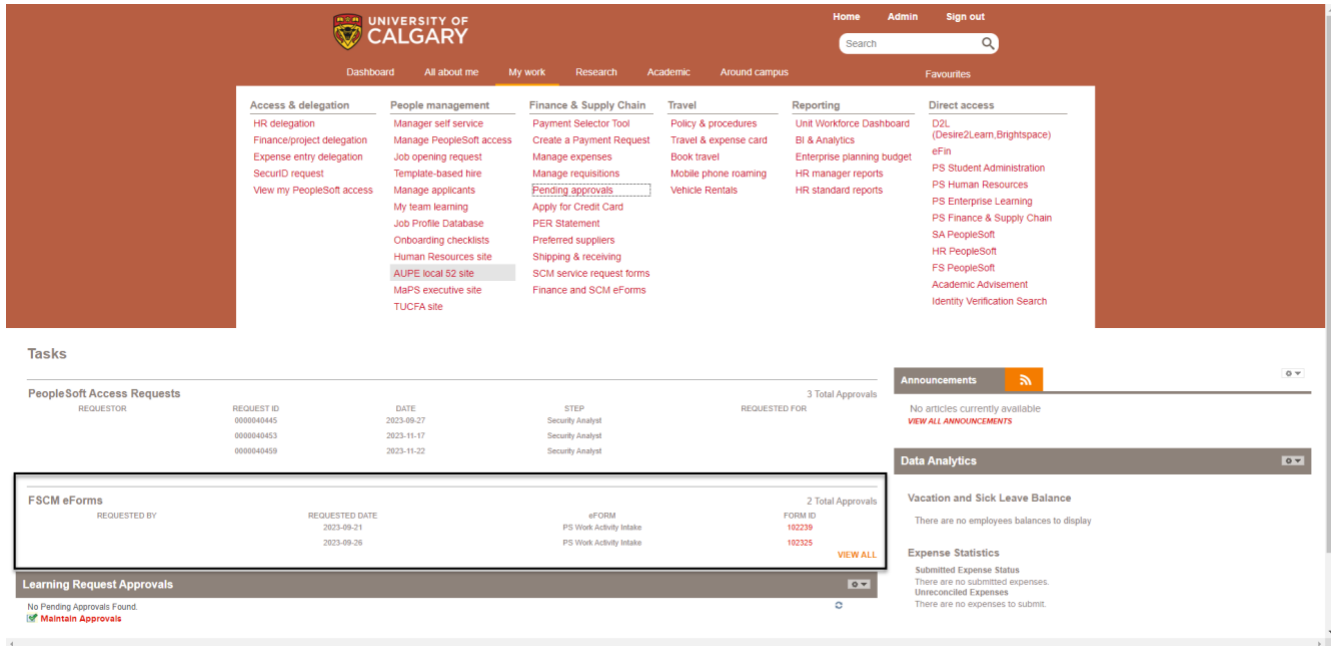
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2. Using the Task List on the Dashboard

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.

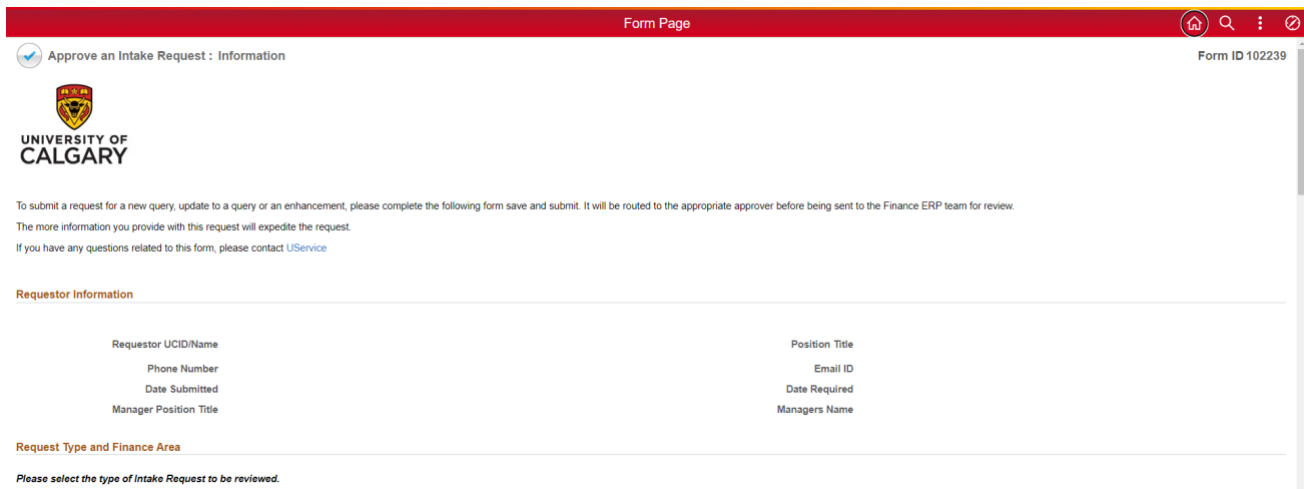
Depending on how many tasks a user has available to them, they may need to scroll down to the FSCM eForms task section.

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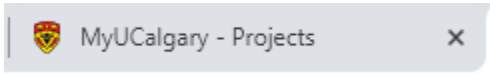
The dashboard features a top navigation bar with 'Home', 'Admin', and 'Sign out' links, along with a search bar. Below this is a secondary navigation bar with categories like 'Dashboard', 'All about me', 'My work', 'Research', 'Academic', and 'Around campus'. A central menu grid includes sections for 'Access & delegation', 'People management', 'Finance & Supply Chain', 'Travel', 'Reporting', and 'Direct access'. The 'Finance & Supply Chain' section highlights 'Pending approvals'. Below the menu, there are several task and announcement tiles: 'PeopleSoft Access Requests' (3 Total Approvals), 'FSCM eForms' (2 Total Approvals), 'Learning Request Approvals' (No Pending Approvals Found), 'Announcements' (No articles currently available), 'Data Analytics', 'Vacation and Sick Leave Balance' (No balances to display), and 'Expense Statistics' (No submitted expenses).

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



The 'Form Page' for 'Approve an Intake Request' includes 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'. The form contains sections for 'Requestor Information' (Requestor UCID/Name, Phone Number, Date Submitted, Manager Position Title, Position Title, Email ID, Date Required, Managers Name) and 'Request Type and Finance Area'. A 'Home' icon is visible at the top right.

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. A Finance & SCM eForm and a search page will appear.

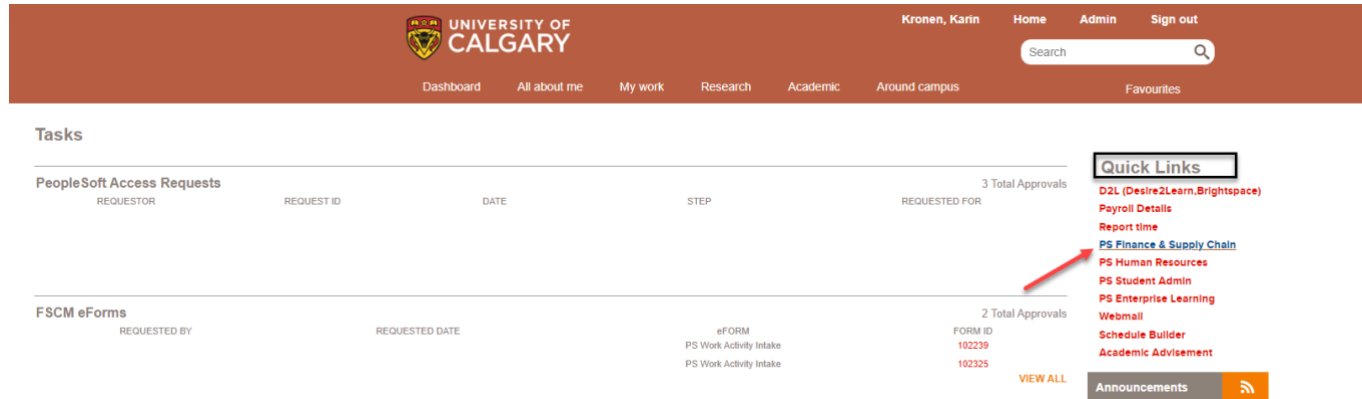
3. Click on the Finance & SCM eForms tile on the Employee Self Service Homepage

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

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Quick Reference Guide

from the Dashboard



The dashboard header includes the University of Calgary logo, user name 'Kronen, Karin', and navigation links for Home, Admin, and Sign out. A search bar is located on the right. Below the header, there are two main task lists:

- PeopleSoft Access Requests:** A table with columns for REQUESTOR, REQUEST ID, DATE, STEP, and REQUESTED FOR. It shows 3 Total Approvals.
- FSCM eForms:** A table with columns for REQUESTED BY, REQUESTED DATE, eFORM (listing PS Work Activity Intake), and FORM ID (listing 102239 and 102325). It shows 2 Total Approvals and a 'VIEW ALL' link.

On the right side, there is a 'Quick Links' menu with the following items: D2L (Desire2Learn, Brightspace), Payroll Details, Report time, PS Finance & Supply Chain (highlighted with a red arrow), PS Human Resources, PS Student Admin, PS Enterprise Learning, Webmail, Schedule Builder, and Academic Advisement. At the bottom right, there is an 'Announcements' section with a feed icon.

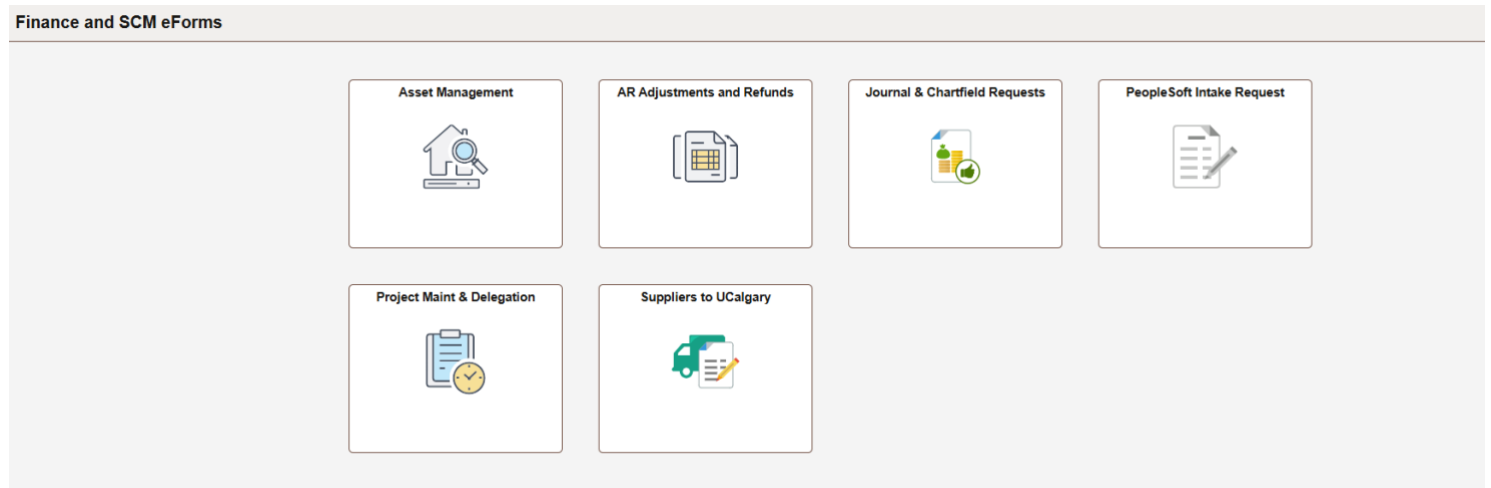
On the Employee Self Service Homepage, the Finance & SCM eForms functional tile takes you to the Finance Dashboard.



The 'Employee Self Service' homepage features a navigation dropdown and four main functional tiles:

- Conflicts of Interest:** Represented by an icon of a person at a computer, with a count of 0.
- Approvals:** Represented by a document icon with a checkmark, with a count of 13.
- Finance and SCM eForms:** Represented by a document icon with a checkmark, highlighted with a yellow border.
- My Time:** Represented by a clock icon.

On the Dashboard select the area of eForms that you need to approve.



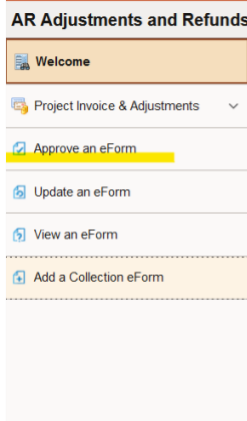
The 'Finance and SCM eForms' dashboard displays a grid of eForm categories for approval:

- Asset Management:** Icon of a house with a magnifying glass.
- AR Adjustments and Refunds:** Icon of a document with a grid.
- Journal & Chartfield Requests:** Icon of a document with a bar chart.
- PeopleSoft Intake Request:** Icon of a document with a pencil.
- Project Maint & Delegation:** Icon of a document with a clock.
- Suppliers to UCalgary:** Icon of a truck and a document.

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

Approving Finance & SCM eForms

Quick Reference Guide



AR Adjustments and Refunds

- Welcome
- Project Invoice & Adjustments
- Approve an eForm**
- Update an eForm
- View an eForm
- Add a Collection eForm

Welcome to AR Adjustments and Refund eForms

On the left, click the arrow beside the folder containing the eForms to be completed.

Once the eForm has been saved or submitted, it can be viewed by the submitter in the **View an eForm** folder where the workflow status can be viewed.

A request that has been Recycled or Saved(not yet submitted) can be found in the **Update an eForm** folder.

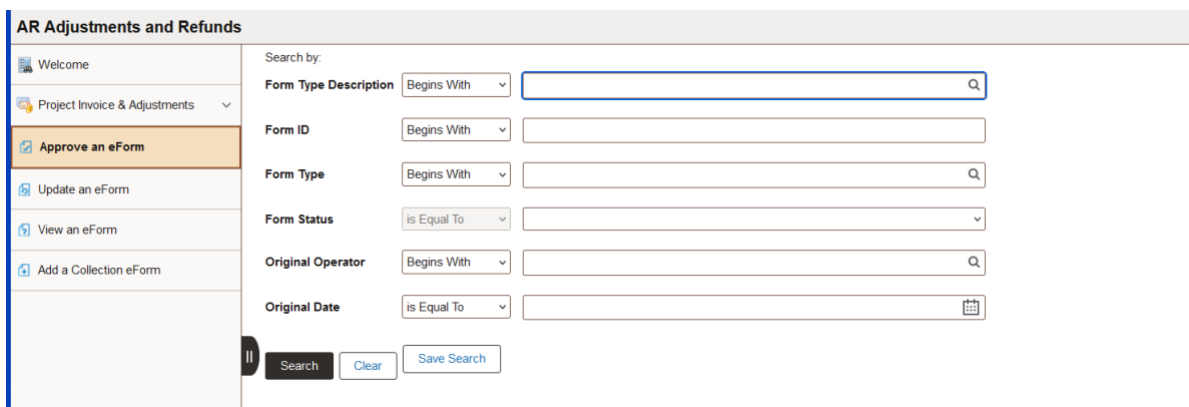
eForms waiting to be approved can be found in the **Approve an eForm** folder.

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.



AR Adjustments and Refunds

- Welcome
- Project Invoice & Adjustments
- Approve an eForm**
- Update an eForm
- View an eForm
- Add a Collection eForm

Search by:

Form Type Description Begins With

Form ID Begins With

Form Type Begins With

Form Status is Equal To

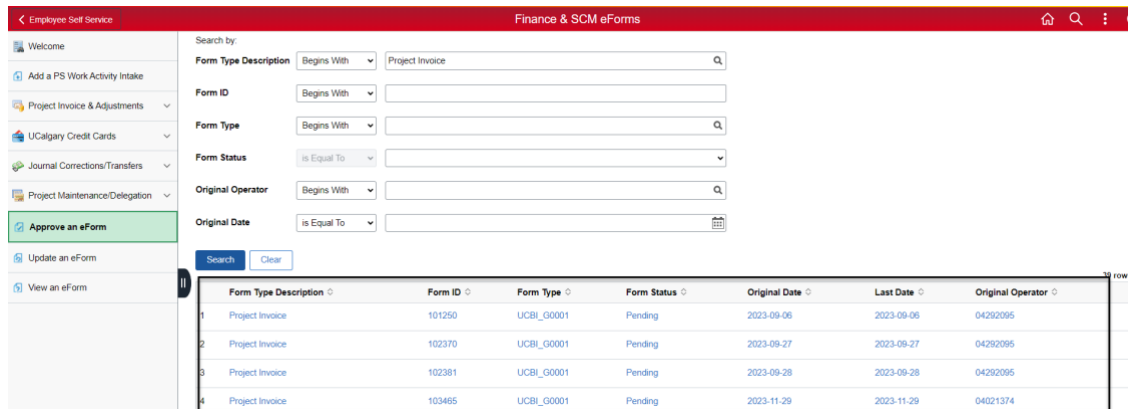
Original Operator Begins With

Original Date is Equal To

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



Form Type Description	Form ID	Form Type	Form Status	Original Date	Last Date	Original Operator
Project Invoice	101250	UCBI_00001	Pending	2023-09-06	2023-09-06	04292095
Project Invoice	102370	UCBI_00001	Pending	2023-09-27	2023-09-27	04292095
Project Invoice	102381	UCBI_00001	Pending	2023-09-28	2023-09-28	04292095
Project Invoice	103465	UCBI_00001	Pending	2023-11-29	2023-11-29	04021374

[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)