Using Finance & SCM eForms
Quick Reference Guide

Effective December 21, 2023

Using Finance & SCM eForms

Purpose: This quick reference guide shows you how to access, create, view, update and/or approve a Finance & SCM eForms in the PeopleSoft fluid user interface.

Finance is moving away from using pdf forms to request items (invoices, journal transfers, and delegation are examples) to an electronic form or eForm.

Audience: All University of Calgary users that submit pdf forms to Finance and Supply Chain Management to complete their daily tasks.

Accessing the eForms

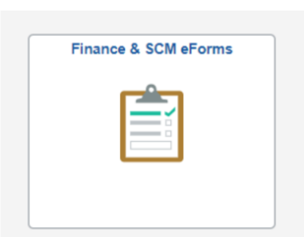
There are multiple ways to reach the Finance & SCM eForms, and we will review them here.

1. **Using the Functional Tiles**

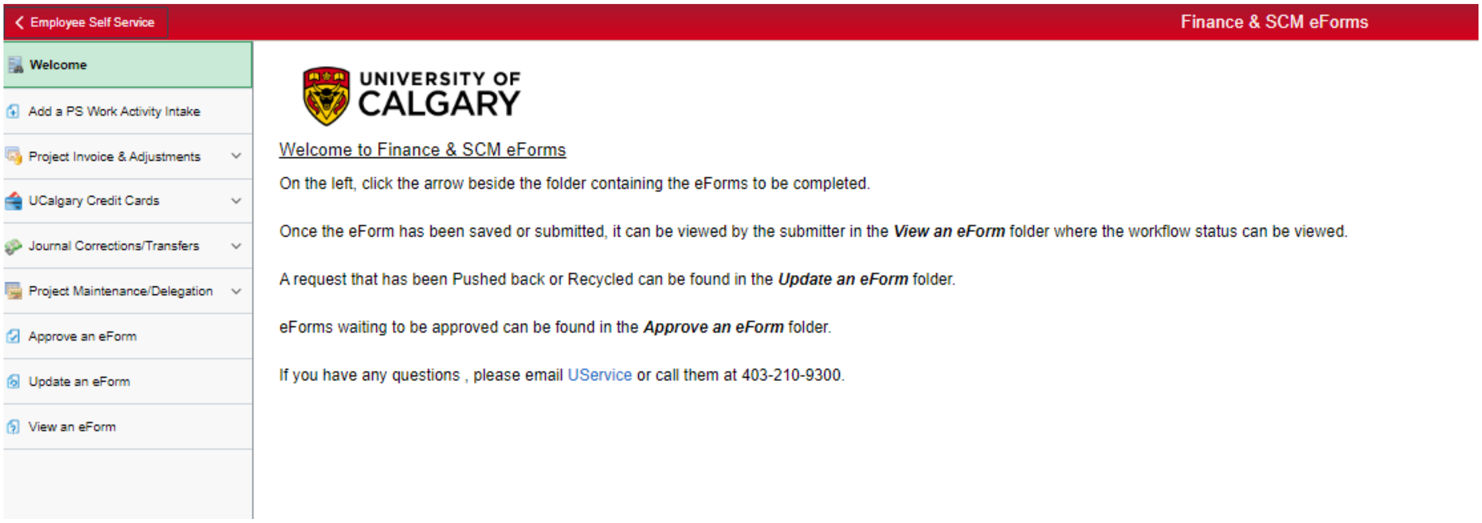
   Log in to PeopleSoft Portal – my.ucalgary.ca

   Navigate to the Employee Self Service home page- My Work >Direct Access > PS Finance and Supply Chain or Use Quick Link [PS Finance and Supply Chain.]()

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

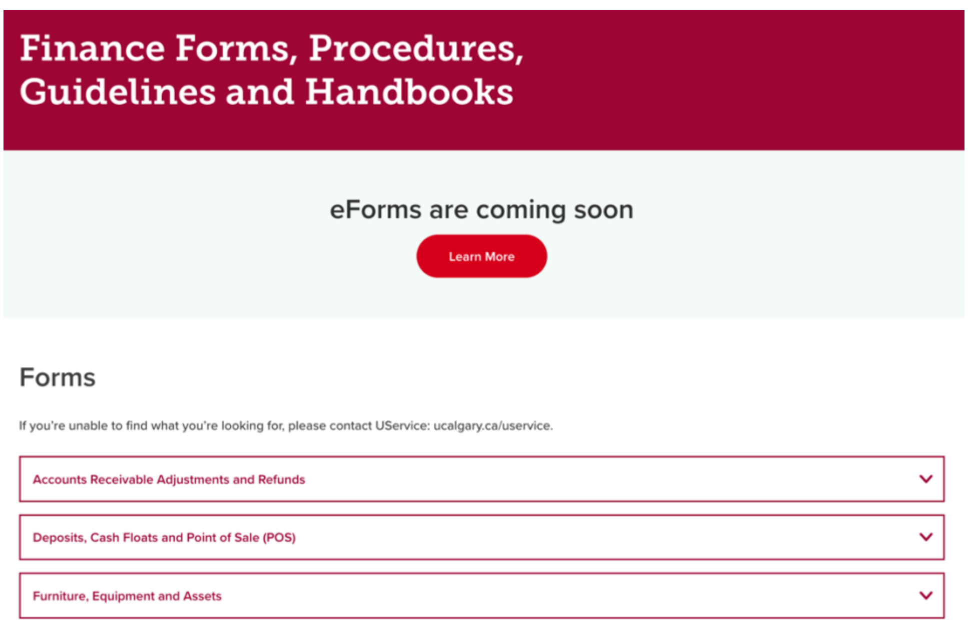


This functional tile takes you to the Navigation Collection for eForms (i.e. A list of available eForms that can be submitted, viewed, updated, and approved).



2. From the Finance Form, Procedures, Guidelines and Handbooks web page
https://www.ucalgary.ca/finance/finance-forms

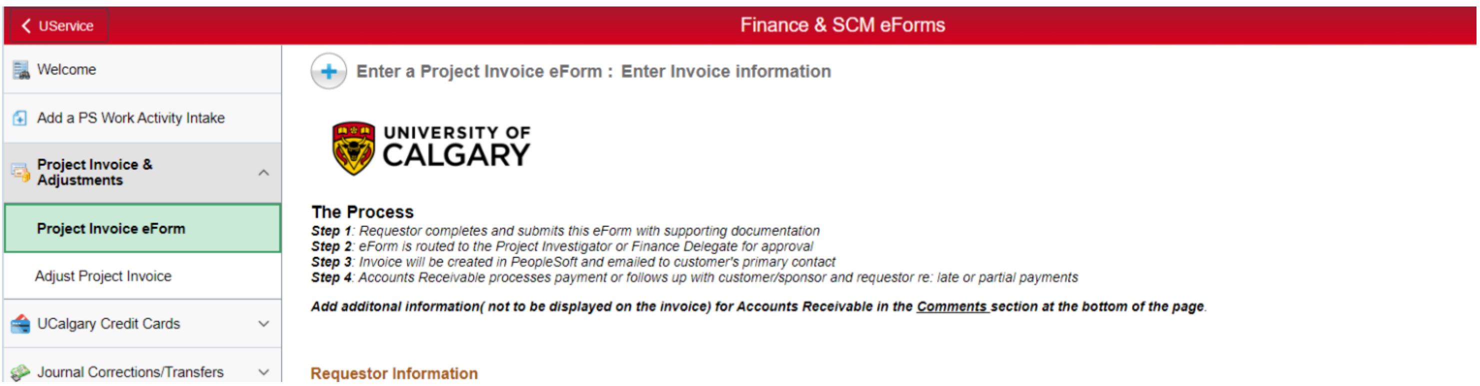
Click on the eForm link you need, and it will take you to the eForm Add Task. If you have not signed into PeopleSoft, you will be asked to sign in with MFA (Multi Factor Authentication).



Using eForms

Add a new eForm

To access the available eForms select the folder for the group of forms you need and click the down arrow. It will open to show a list of the accessible Finance eForms which matches the list of pdf forms on the Finance Forms web page. Click on the eForm that you wish to submit.

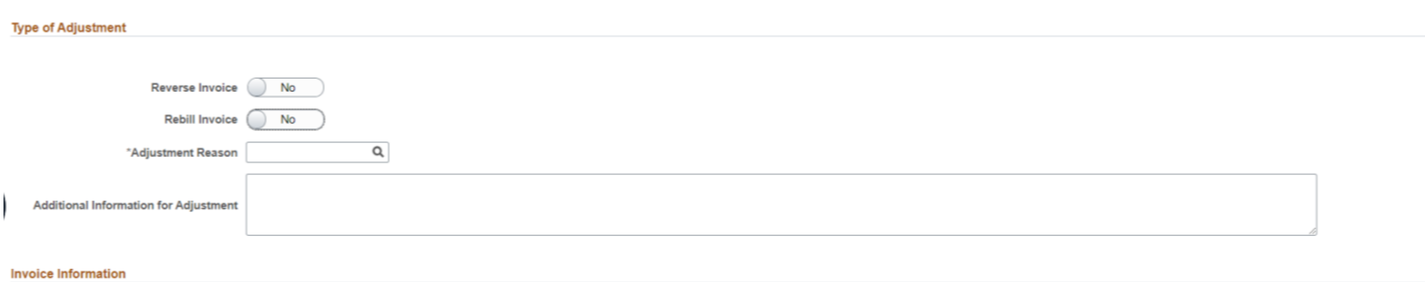


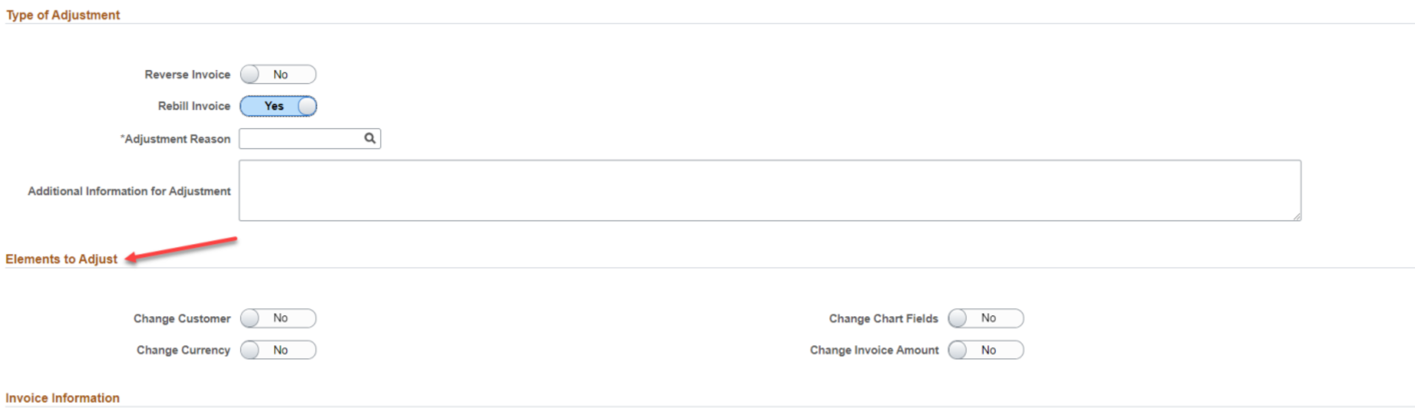
The black button on the left side of the page will expand or collapse the Navigation Collection.
The Form ID in the right-hand corner is a unique identifier for the submitted form - it can be used on the 'Update an eForm' or 'View an eForm' folder to pull up a submitted/saved eForm.

The icon at top of the page indicates that it is in the '**Add an eForm**' mode.

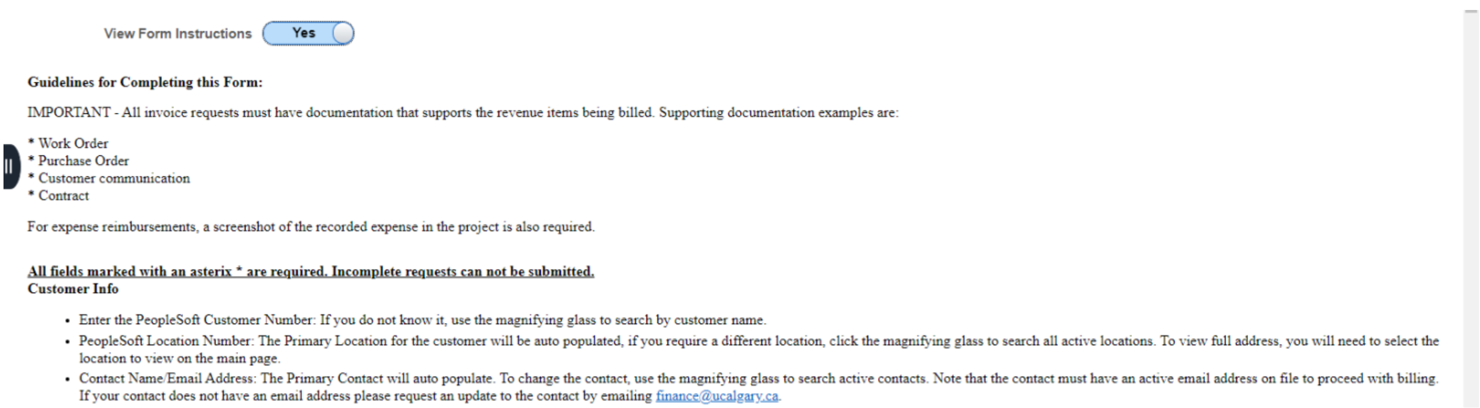
Yes/No Checkboxes may expand the sections or show other sections in the form. This may be additional information required for a request or contain information that pertains to the eForm i.e. Form Instructions.

Yes to 'Rebill Invoice' opens a new Section called 'Elements to Adjust'.





Yes to 'View Form Instructions' expands the current section with additional information.


View Form Instructions Yes

Guidelines for Completing this Form:

IMPORTANT - All invoice requests must have documentation that supports the revenue items being billed. Supporting documentation examples are:

* Work Order
* Purchase Order
* Customer communication
* Contract

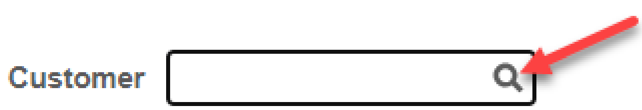
For expense reimbursements, a screenshot of the recorded expense in the project is also required.

All fields marked with an asterix * are required. Incomplete requests can not be submitted.
Customer Info

- Enter the PeopleSoft Customer Number: If you do not know it, use the magnifying glass to search by customer name.
- PeopleSoft Location Number: The Primary Location for the customer will be auto populated, if you require a different location, click the magnifying glass to search all active locations. To view full address, you will need to select the location to view on the main page.
- Contact Name/Email Address: The Primary Contact will auto populate. To change the contact, use the magnifying glass to search active contacts. Note that the contact must have an active email address on file to proceed with billing. If your contact does not have an email address please request an update to the contact by emailing finance@ucalgary.ca.

Any field that has an asterisk beside it is a required field and the eForm cannot be submitted until it is populated.

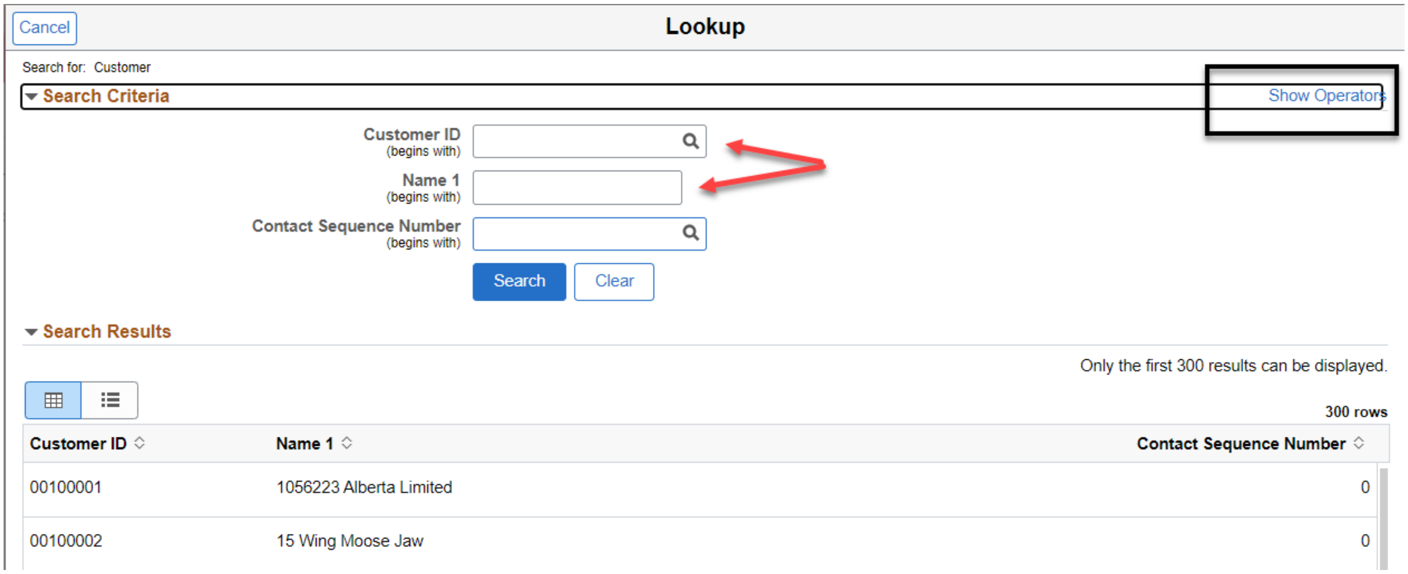
The magnifying glass next to a field indicates there is a search page that can be used to populate the data.

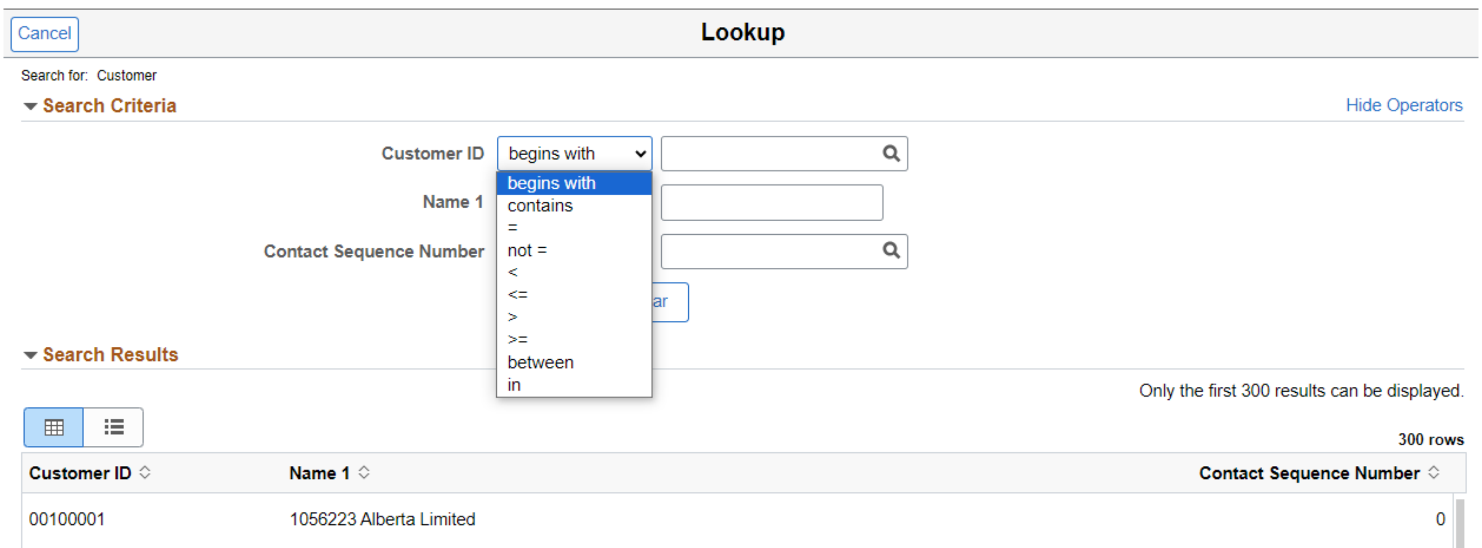


A Lookup window will pop up, if it does not pop up, check the settings on the browser to ensure Pop Up Blockers are turned off.

For information on [How to Turn off Pop Up Blockers]

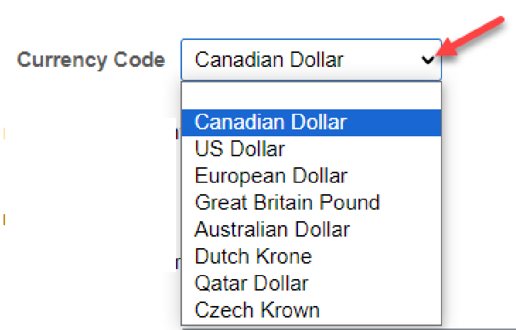
The Search Criteria box is not automatically expanded - click the arrow beside 'Search Criteria' to expand and view the search parameters. The search parameters are defaulted to '*begins with*', other options are available if the 'Show Operators' link is clicked.



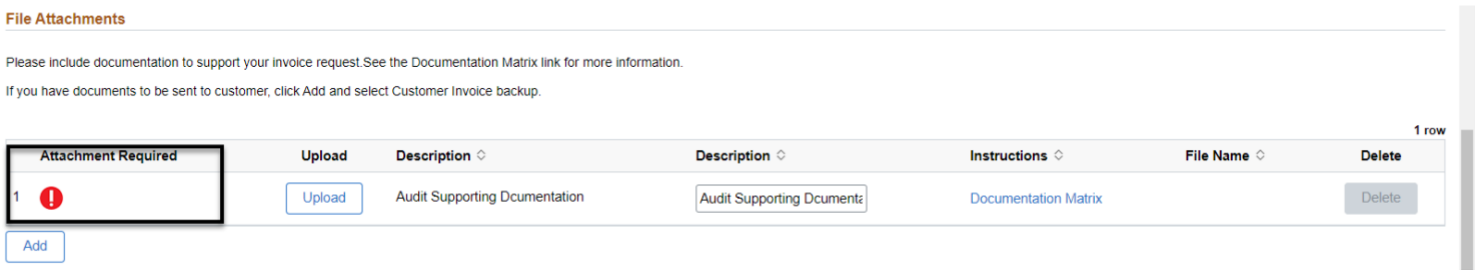


Once the search results have populated, click on the item you want to see its data.

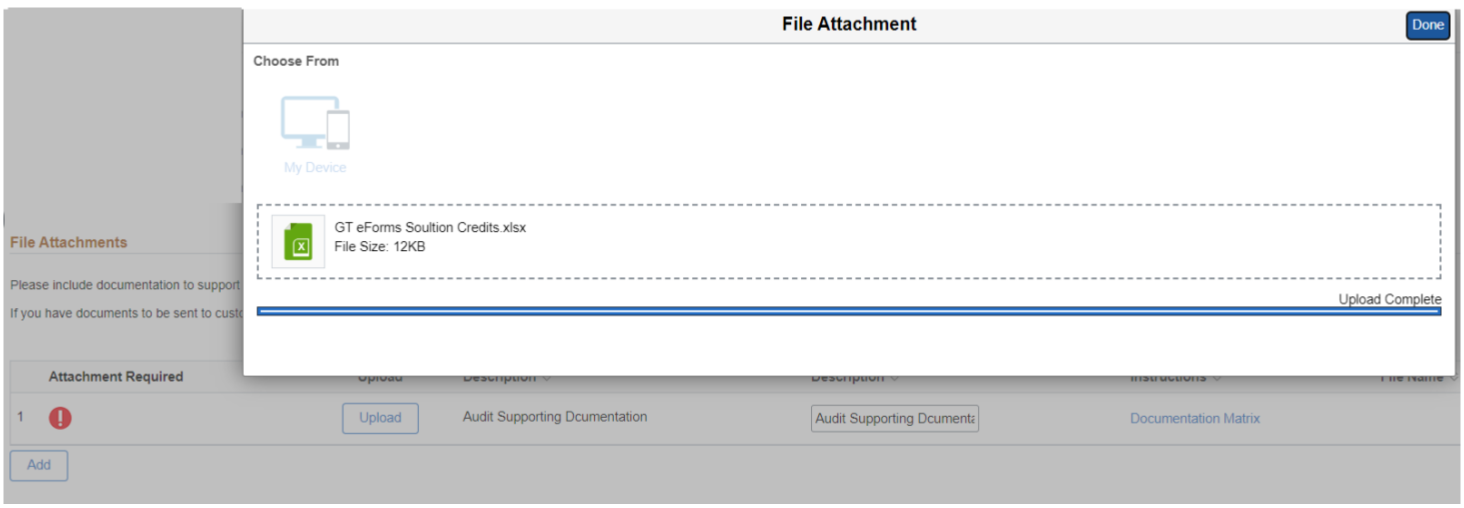
If there is an arrow in the field, there is an associated dropdown list.



Attachments can be added at the bottom of the page to support the request. If there is a red circle with an exclamation mark, then an Attachment is required, and the form cannot be submitted without an attachment.

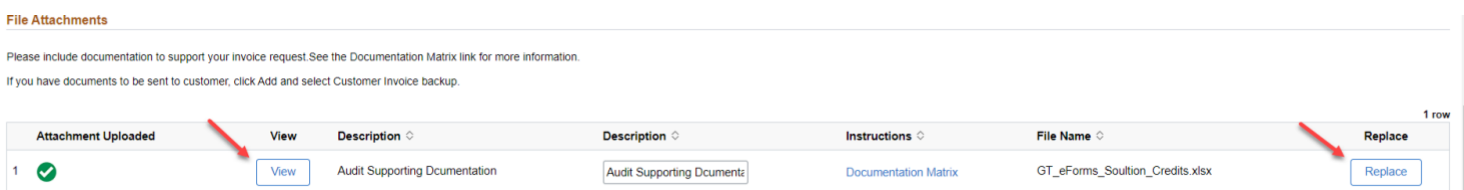


To add an attachment, click the Upload button and find the document/excel spreadsheet/screen shot needed. Once uploaded click Done.



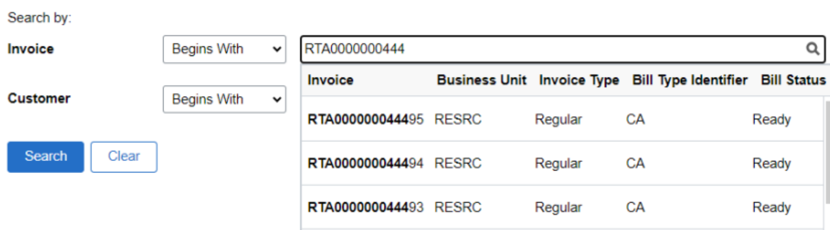
If more than one document needs to be attached, click the ‘Add’ button to add a new row and then follow same steps to upload a second document.

Once a document is uploaded. it can be viewed by clicking on the ‘View’ button or replaced by clicking on the ‘Replace’ button.

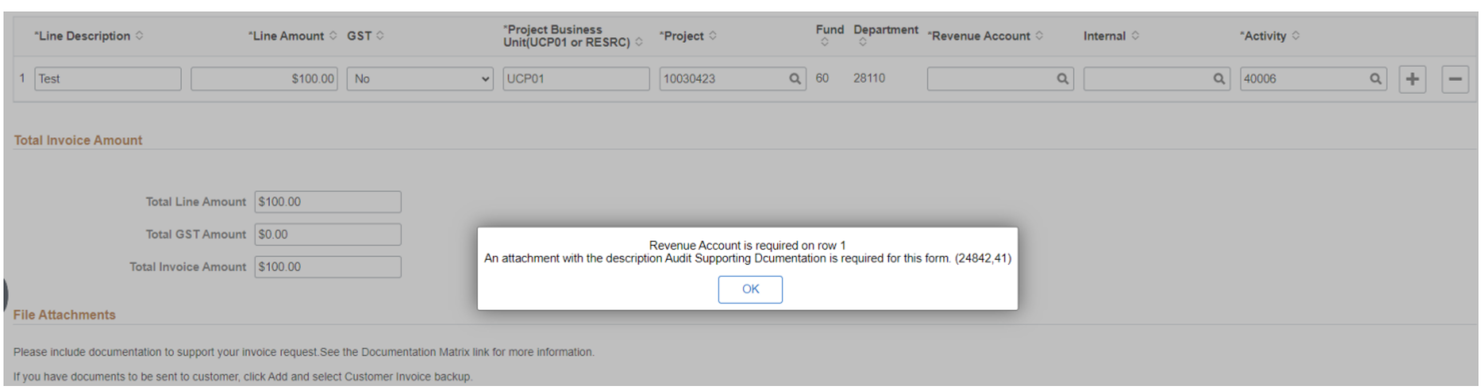


If there are additional comments that pertain to the eForm being submitted, they can be entered in the Comments section at the bottom of the page. lick the arrow to expand the comments section.

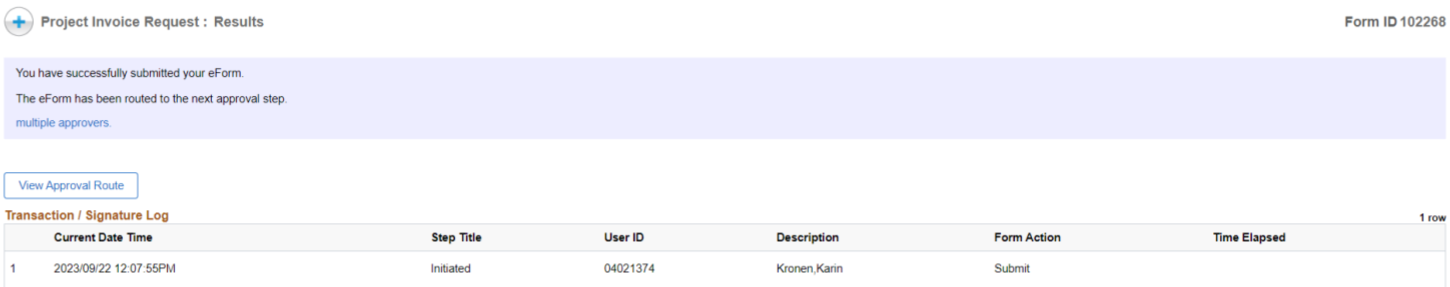
Some eForms can have their data pre-populated using a search page.



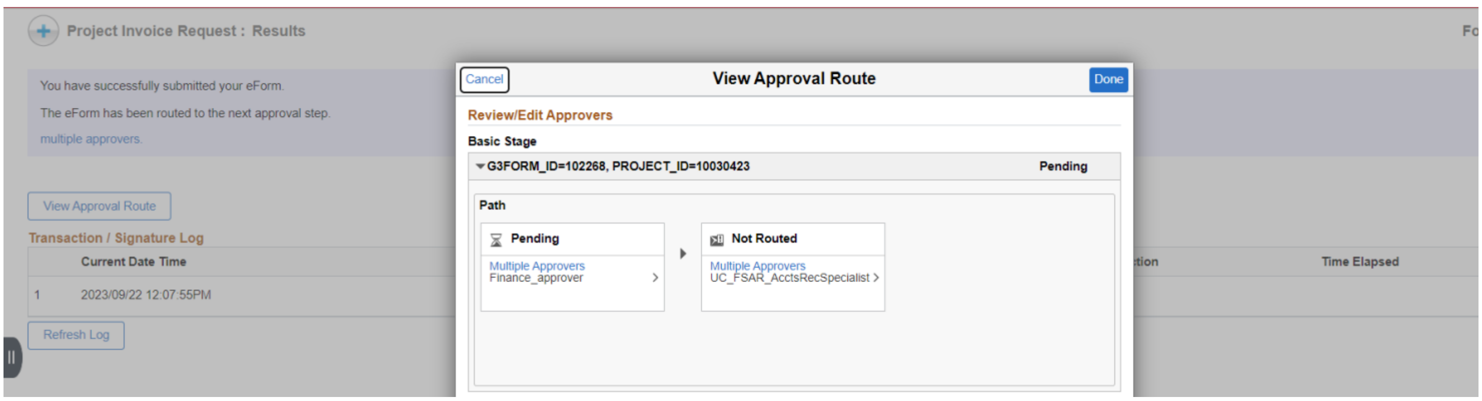
Once the form is complete, click the 'Submit' button at the bottom of the page. If a required field is not completed or a mandatory attachment is not included, an error message will pop up identifying what changes need to be made before the submission will be accepted. Click 'OK' on the error message and then update the necessary fields.



Once submitted, a results page will load.



The ‘View Approval Route’ button will show the Workflow that the request will follow and the status at each stage.

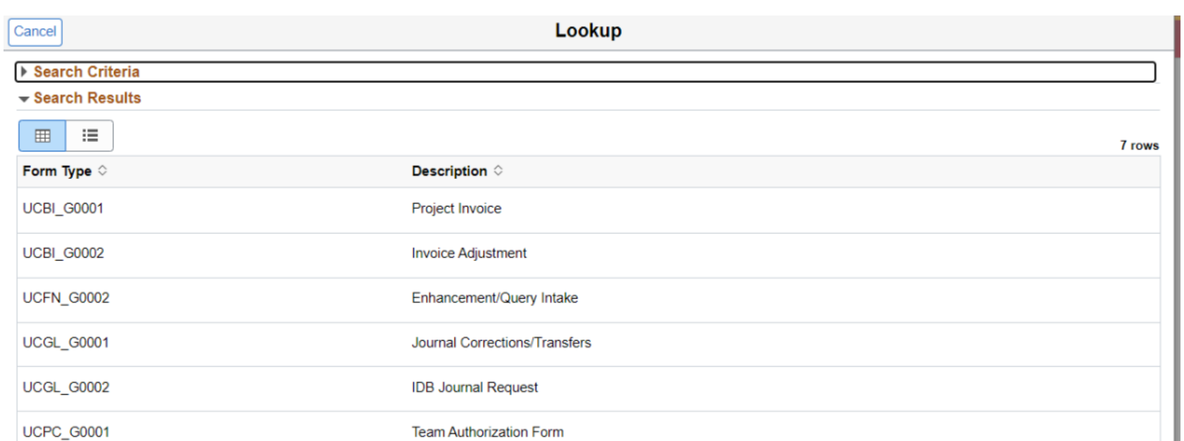


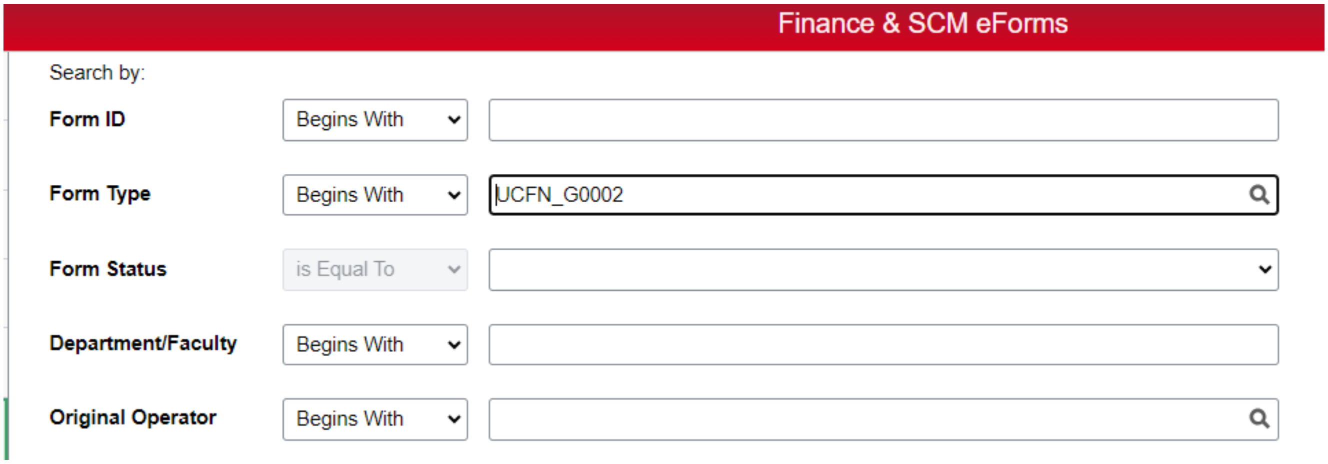
If there is a ‘Multiple Approvers’ link, click it to see who can approve the eForm.

Approve an eForm

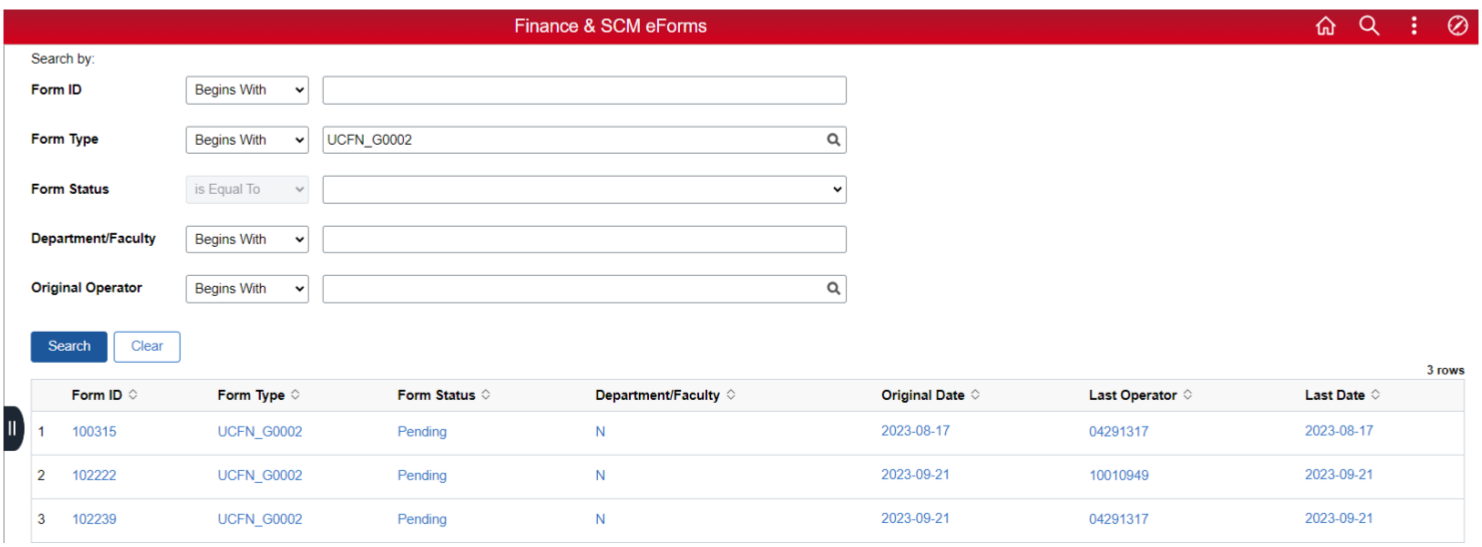
This folder is where the eForms requiring approval will be located. When the folder is clicked on a Search page will appear. Enter any of the Search parameters to begin your search. Please note, approvers will only see the eForms that have been assigned to them.

If you know the Form ID, enter it to pull up the specific eForm, or click the magnifying glass next to ‘Form Type’ for a list of eForm types.





Click Search



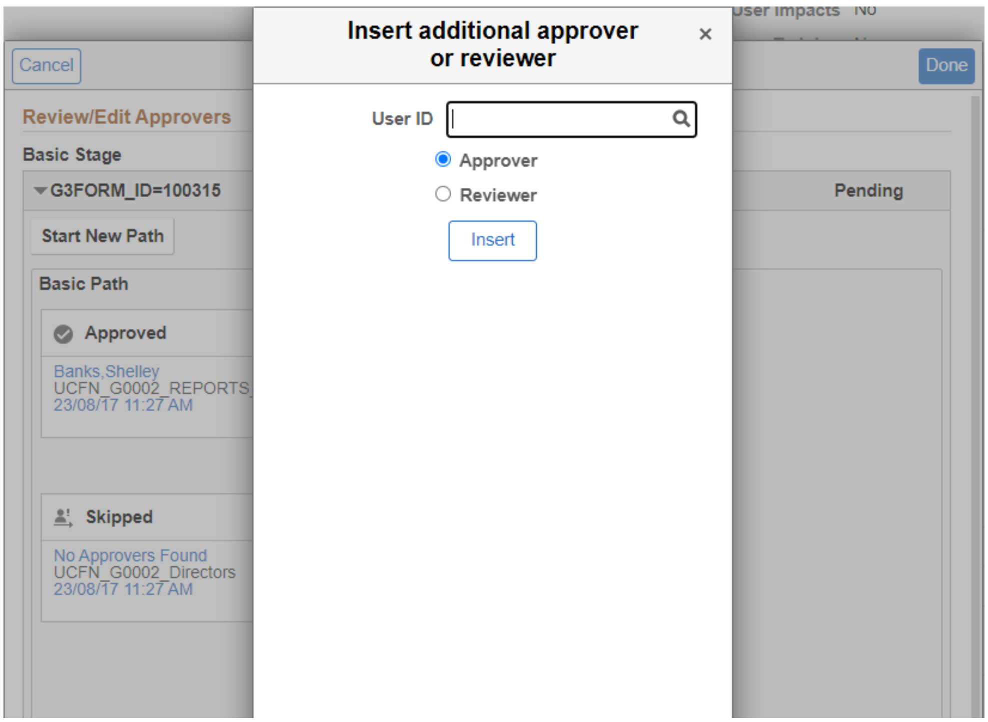
	Form ID	Form Type	Form Status	Department/Faculty	Original Date	Last Operator	Last Date
1	100315	UCFN_G0002	Pending	N	2023-08-17	04291317	2023-08-17
2	102222	UCFN_G0002	Pending	N	2023-09-21	10010949	2023-09-21
3	102239	UCFN_G0002	Pending	N	2023-09-21	04291317	2023-09-21

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, Pushedbacked or Approved.

- **Deny**: Request cannot move forward, and a new request will need to be created.
- **Recycle**: Sends the eForm back to the original submitter.
- **Pushback**: When there are multiple levels of approval, pushback allows an approver to request approval at the previous level. Please note pushback only goes back one approval level on workflow.
- **Approve**: Request is moved to next workflow or authorization levelor is sent to PeopleSoft (Executed).

Approvers can use the 'Add Ad Hoc Approver' or 'Reviewer' functions if it is determined someone other than those available in the workflow need to approve or review a request. This is done by clicking the + sign after the workflow box:

Enter the User ID (UCID) in the box or click the magnifying glass to search by name.

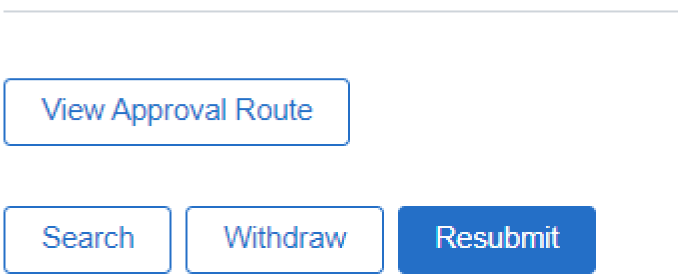


- Denied: The request is denied and will not be processed. The requestor will need to initiate a new request.
- Recycled: The request is being sent back to the original requestor so they can make updates based on the approver's comments.
- Approved: The request is approved and will move on to the next step in the workflow, if this is the final step/approval level then the request will be actioned/completed in PeopleSoft.

Update an eForm

If an eForm was initiated but not competed and then saved, it can be found in the '**Update an eForm'** folder.
If an eForm has been returned to the requestor to edit and/or add information, it can also be found in the '**Update an eForm'** folder.

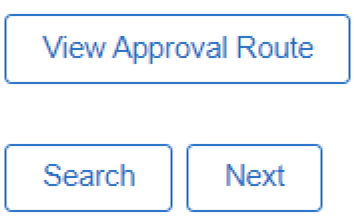
Once the eForm has been updated the requestor can *Resubmit* or *Withdra*w the request.



Withdraw: The request will be cancelled and not be processed any further.
Resubmit: The request will be put back into Workflow and will be routed to the Approver at the next step.

View an eForm

Once an eForm has been submitted, it can be found in the '**View an eForm'** folder. These eForms are Read Only and cannot be edited. The stage the submitted eForm is at currently can be seen by clicking View Approval Route'.



The ‘Next’ button will go to the Form History page where the Current Step, Form Action and Time elapsed can be seen.