

PeopleSoft Workflow

Raja Palaniappan

www.psoftsearch.com

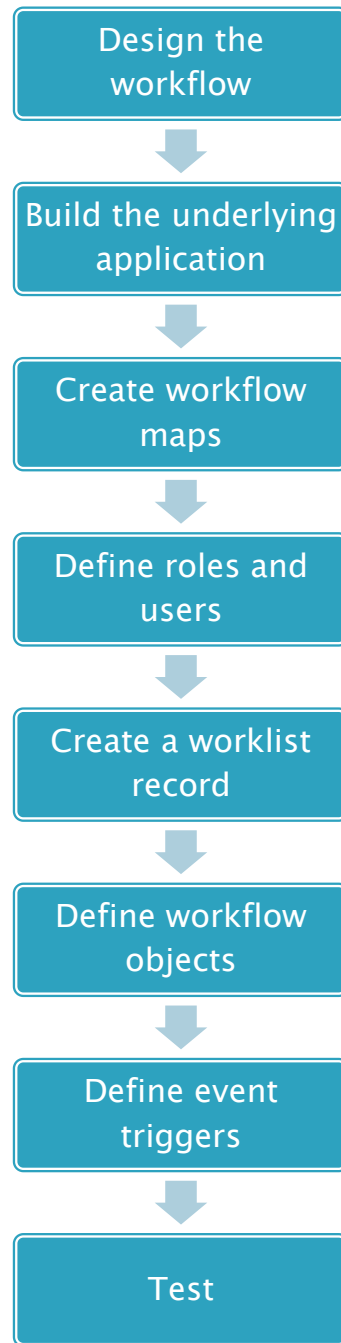
Many of the tasks that you perform throughout the day are part of larger tasks that involve several steps and several people

For example, when you order supplies, you are really initiating an approval process:

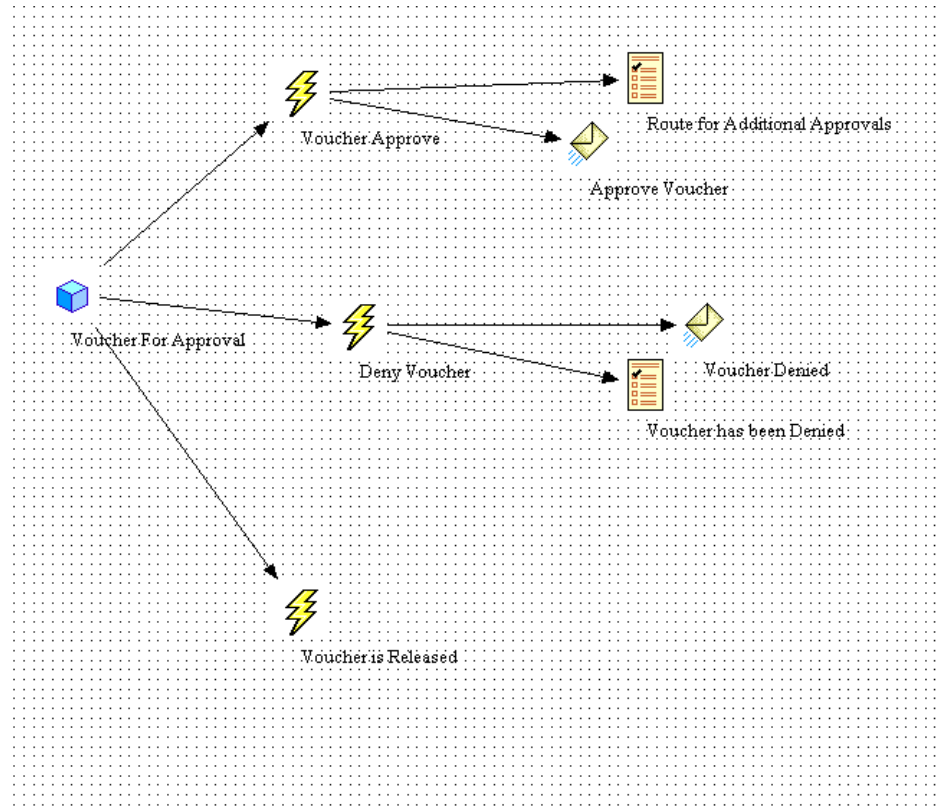
- someone else reviews the order and either approves or denies it.
- If the order is approved, a purchase order is sent to the vendor.
- If it is denied, notification is sent back to the person who submitted the original order.

The term *workflow* refers to this larger process.

Steps



1. Design : Identify the workflow rules and how they relate to the data objects and transactions in the PeopleSoft system
2. Build the underlying application
3. Create workflow maps : Create graphical maps that represent your business process



4. Define roles and users :

We can define a role as

- User list roles – a fixed list of individual role users (SYSTEM ADMINISTRATOR)
- Query roles – a query that selects role users at runtime(ROLE QUERIES)
- Route controls – a routing factor that selects user at runtime(Department)

RULES – THE RULES GOVERN THE BUSINESS PROCESS

ROLES – DEFINES HOW PEOPLE FIT INTO THE WORKFLOW PROCESS

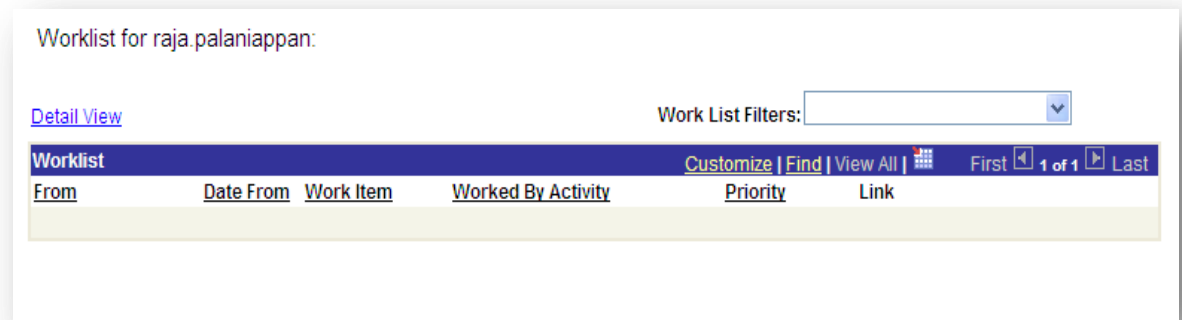
ROUTINGS – DETERMINES WHICH ROLE OWNS THE PROCESS AT EACH STEP

5. Create a worklist record :

The Worklist can include several different types of items at once. For example, a manager might have entries related to approving both employee course enrollments and orders for supplies.

Entries in worklist are stored in database tables. You define the structure content of these tables by creating worklist records.

When a business event routes a work item to a worklist, it adds a row to the table. When a user finishes with a work item, the system marks the row as worked.



The worklist record determines which fields of information the system stores for each work item.

Worklist Record Definitions

System Fields

The first fields in a worklist record definition must always be the following system fields:

BUSPROCNAME
ACTIVITYNAME
EVENTNAME
WORKLISTNAME
INSTANCEID
TRANSACTIONID

The system uses these fields to link the items in the worklist with their tracking information, which is stored in the PeopleSoft-defined table PSWORKLIST.

Application Fields

The next set of fields in a worklist record definition are those specific to the application that creates the worklist. The system uses these fields to retrieve the associated record from the database when the user selects a worklist entry and moves to the page where the work is done.

Worklist Display Fields

The last two fields in a worklist record definition are for descriptive information that appears in the worklist.

WORKLIST_URL
WORKLIST_DESCR

These fields are optional.

Worklist Attributes

Name: Asset Approval Worklist

Worklist Record: AM_MY_ASSET_WL

Worked By:

Business Process: AM_SELF_SERVICE

Activity: AM_MY_APPROVAL

Worklist Page Attributes:

- Show Instances
- Allow Multiple Unworked
- Worklist Acts as Prompt List
- Pooled List
- Timeout Processing Active
- Reassignable

Mark Worked When:

- User Specified
- Saved
- Selected
- Programmatic

Timeout Parameters:

Late After:

Days: 0

Hours: 0

Minutes: 0

- Email Assigned Current User
- Email Supervisor
- Send Timeout Worklist

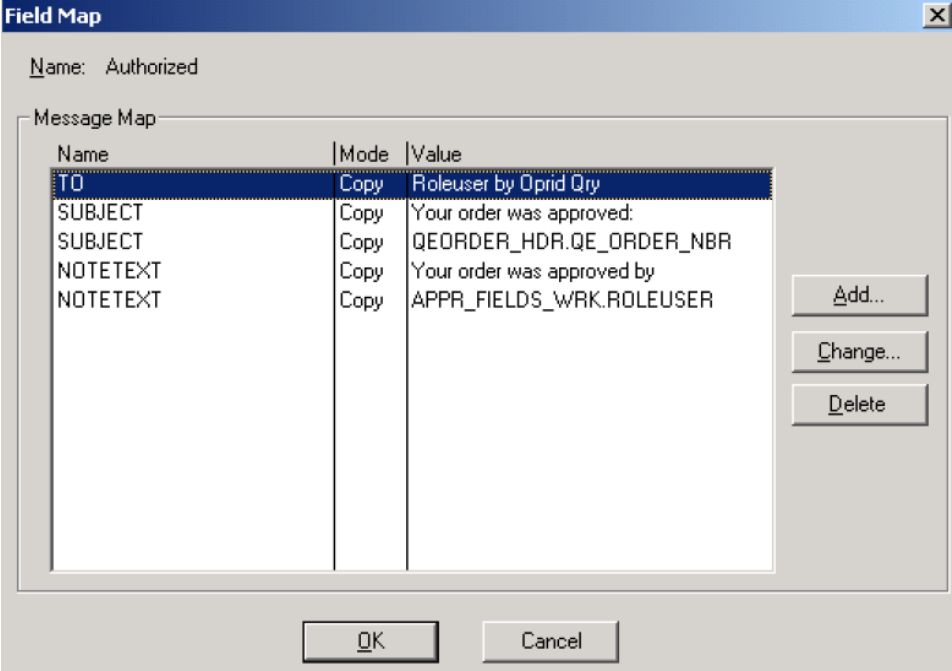
OK Cancel

6. Define workflow objects:

Events and routings are both objects on the workflow maps. To define these workflow objects, add the icons to the map, linked to the step representing the page where the triggering event occurs and map fields for the routing in the Field Map dialog box.

Events are conditions that have associated routings.

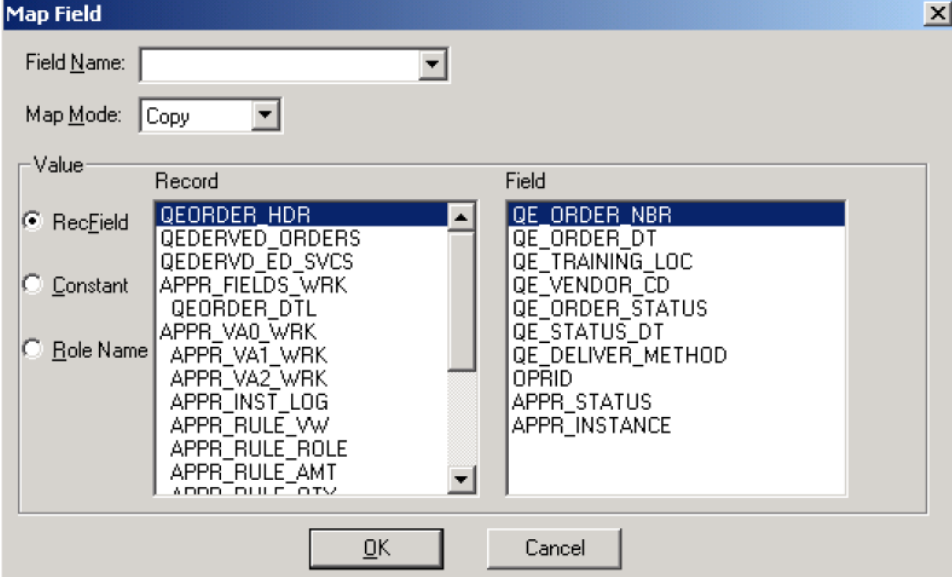
Routings can deliver data in two forms: worklist entries and email messages.



The Field Map dialog box is titled "Field Map" and has a close button (X) in the top right corner. The "Name" field is set to "Authorized". Below this is a "Message Map" section containing a table with three columns: "Name", "Mode", and "Value".

Name	Mode	Value
TO	Copy	Roleuser by Oprid Qry
SUBJECT	Copy	Your order was approved:
SUBJECT	Copy	QEORDER_HDR.QE_ORDER_NBR
NOTETEXT	Copy	Your order was approved by
NOTETEXT	Copy	APPR_FIELDS_WRK.ROLEUSER

To the right of the table are three buttons: "Add...", "Change...", and "Delete". At the bottom of the dialog are "OK" and "Cancel" buttons.



The Map Field dialog box is titled "Map Field" and has a close button (X) in the top right corner. It features a "Field Name" dropdown menu and a "Map Mode" dropdown menu set to "Copy". Below these is a "Value" section with three radio buttons: "RecField" (selected), "Constant", and "Role Name".

The "RecField" section contains two lists:

- Record:** QEORDER_HDR, QEDERVD_ORDERS, QEDERVD_ED_SVCS, APPR_FIELDS_WRK, QEORDER_DTL, APPR_VA0_WRK, APPR_VA1_WRK, APPR_VA2_WRK, APPR_INST_LOG, APPR_RULE_VW, APPR_RULE_ROLE, APPR_RULE_AMT, APPR_RULE_QTY
- Field:** QE_ORDER_NBR, QE_ORDER_DT, QE_TRAINING_LOC, QE_VENDOR_CD, QE_ORDER_STATUS, QE_STATUS_DT, QE_DELIVER_METHOD, OPRID, APPR_STATUS, APPR_INSTANCE

At the bottom of the dialog are "OK" and "Cancel" buttons.



- Business Process icon



- Activity icon



- Step icon



- Link icon



- Business Event icon



- Worklist icon



- Email icon

7. Define event triggers

After you create workflow processes, link them into the PeopleSoft applications by adding PeopleCode programs to the pages. The PeopleCode detects when a business rule has been triggered and determines the appropriate action.

TriggerBusinessEvent function triggers a specified business event and the workflow routings that are associated with that event. It has to be written under the Workflow PeopleCode event.

```
BUSINESS_UNIT (field) Workflow
If TriggerBusinessEvent(BusProcess."DSI_WORKFLOW",
BusActivity."DSI_VOUCHER_ADD", BusEvent."Init_DSI_WorkList") Then
Else
```

If Approval Rule sets are involved then the approvers and routings are selected dynamically based on those Rule sets.

Approval Rule Sets are a set of routing rules created in Application Designer.



In Approval Rule sets, Virtual Approver determines the appropriate approver and sends a workflow routing. As each approver completes the approval, Virtual Approver determines whether additional approvals are needed and, if necessary, sends additional workflow routings. To trigger Virtual Approver from a page, use two PeopleCode functions in the record definition that is associated with the page:

- Use the **Virtual_Approver** function in the Save Edit PeopleCode.

This function checks the approval rules that you defined in the approval rules sets and determines whether an item must be routed for approval.

- Use the **Virtual_Router** function in the Workflow PeopleCode.

This function routes items to the next step in the approval process.

Rule Step Definition

Definition | Rules | Events

Icon Descr:

Route to Role:

Equally Authorized Roles:

On Further Processing:
 Workflow Only
 Message Only
 Both

Skip to Next Step:
 Yes
 No
 Only skip if cannot authorize

Message Catalog:
Set:
Number:

Step Number: Path Number:

Rule Step Definition

Definition | Rules | Events

On Pre-Approved

Activity: APPR_VCHR

Event: Voucher Approve

On Deny

Activity: APPR_VCHR

Event: Deny Voucher

On Recycle

Activity: APPR_VCHR

Event: Recycle Voucher

OK Cancel

Rule Step Definition

Definition Rules Events

Amount Rule:

	Min	Max	Record	Field
1	-10000.000	10000.000	VCHR FS	GROSS AMT
2				
3				
4				
5				

Quantity Rule:

	Min	Max	Record	Field
1				
2				
3				
4				
5				

Row Level Rule

Route Control SQL Object

	Route Control	Record	Field
1	DEPTID	LMSCH VW	DEPTID
2	PROJECTID	LMSCH VW	PROJECT ID
3			
4			
5			

OK Cancel

8. Testing

Create Vouchers and test your workflow.

Further Reading

[Enterprise PeopleTools 8.49 PeopleBook: Workflow Technology](#)