ENTERPRISE COMPONENTS
FORMS AND APPROVAL BUILDER

Forms and Approval Builder enables organizations to replace paper forms and emails with electronic forms that are configurable by business analysts, enabled with approval workflows, and immediately deployable and auditable.

KEY FEATURES
- Business analyst-configurable
- Approval Workflow-enabled
- Reportable audit trail
- Attachments supported
- Single click copy of form data into a PeopleSoft transaction

KEY BENEFITS
- Flexibility with business analyst-configurable forms
- Access to data typically trapped on paper
- Effective and efficient form management
- Easy to navigate and complete forms
- Immediate availability of approvals
- Elimination of dual data entry

Business Analyst-Configurable Forms Support Efficient Business Processes
Consistent use of forms across your organization ensures that information is collected in a systematic and auditable manner. Many organizations have email-based, or even paper-based, forms that are required to support their daily business processes. PeopleSoft Forms and Approval Builder enables you to remove this haphazard way of obtaining information throughout your organization, capturing both the form and its approval trail within your PeopleSoft Enterprise system.

Form Design
Every organization employs a variety of forms to document and conduct daily business processes. PeopleSoft Forms and Approval Builder, part of Enterprise Components, enables business analysts to create electronic, routable forms without having to use PeopleSoft Application Designer. A typical form can be designed and in use within 30 minutes and requires no writing of code.

The intuitive wizard guides you step by step through establishing a form. Options include adding instructions to the form, similar to what you would find on the back of a paper form; adding attachments to the form for users to read, submit, or both; and being able to create your own fields on the form. These fields can be plain text, numbers, date and time, yes/no, code fields, prompt fields, and section fields. The code field type enables you to build a list of items on the fly that a person who is filling in the form can select from when perusing the drop-down list. You can create these user prompt values in the code fields without having to enter them in a standard PeopleSoft record beforehand.
Figure 1. Adding fields to the form. Fields can be placed in one or two columns on the screen.

Prompt fields allow you to prompt against existing PeopleSoft Records. Prompt values are able to be limited by the selection of other text, code or prompt fields’ values. For example, if your user selects a Business Unit from a prompt, you can limit the Project IDs shown in the next prompt to only those within the selected Business Unit. This drives both efficiency and accuracy within your organization.

HTML section fields allow custom images and logos, text headers, section lines and inline instructional text to be added to the form, thereby personalizing the form for your organization.

Fields can be organized into one or two columns on the screen, and every field on the form has the option of being made required to ensure that users thoroughly complete the form.

Figure 2. Creating the Code Type values. Note that this is a required field and therefore the Required checkbox is selected.
You specify the location of the form in the PeopleSoft Main Menu through an easy-to-navigate folder hierarchy, and you select the flow of approvers that the form will follow using the approvers from within the Approval Workflow Framework.

To ensure good data governance and integrity, you have the option when designing a form to lock down data entered in the form after form submission or after form approval. There is also the ability to make forms available for only specific periods of time.

**Mapping Form Fields to PeopleSoft Component Interface Properties**

In addition to designing a form to replace your paper form, you have the option to map fields within a form to PeopleSoft Component Interface Properties, thereby eliminating dual data entry within your organization. A technical analyst, who has some familiarity with PeopleSoft Component Interfaces, will be able to use the form that was created during form design to map fields on the form to the correct fields within the PeopleSoft database. The technical analyst has the option of mapping form fields to PeopleSoft Component Interfaces or to your own custom Component Interfaces. You may link to one or more PeopleSoft Component Interfaces from a single form.

After routing the form through the approval process, the final step will be for a user with the necessary security to submit this data to the PeopleSoft database via the Save and Post Form button.

**Efficient and Effective Forms Management for your Organization**

Knowing how many of each type of form are in the system and their approval status is essential in monitoring your business processes. PeopleSoft Forms and Approval Builder comes with its own summarization table, enabling you to see at a glance how many forms of each type have been created and how many forms are in each approval status. This central Form Management repository also enables you to activate and deactivate your forms within the system in one place, eliminating the need to go back into the design of each form and activate it.

The ability to find a particular form in an instant is also important in supporting efficient operations. Forms are searchable by subject, form type, priority, due date, and approval status to eliminate the need for searching through piles of paperwork.

**Easy to Navigate Forms Available to Your Users When they Need Them**

Any given form may be accessed through either the central forms repository or the link you designate for it in within the PeopleSoft Menu navigation. Users open a blank form; enter the required information; download, read, fill in, and upload attachments; and submit their form for approval.
Figure 3. Filling in the form.

Forms are available to the approver instantly, and approvals are also available as soon as they are granted.

Figure 4. Previewing the Approval Workflow for the form.

Finally, because the Forms and Approval Builder utilizes the existing infrastructure of the Approval Workflow Engine and the Supplemental Data Framework, your forms and approvals are migrated like all other application data during an upgrade between PeopleSoft Releases.

Contact Us
For more information about PeopleSoft Asset Management, please visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.