

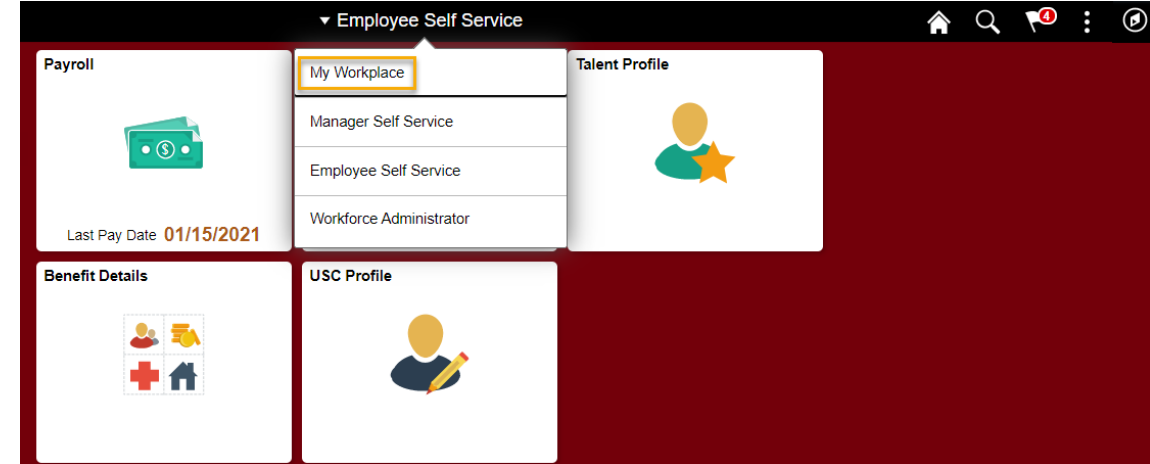
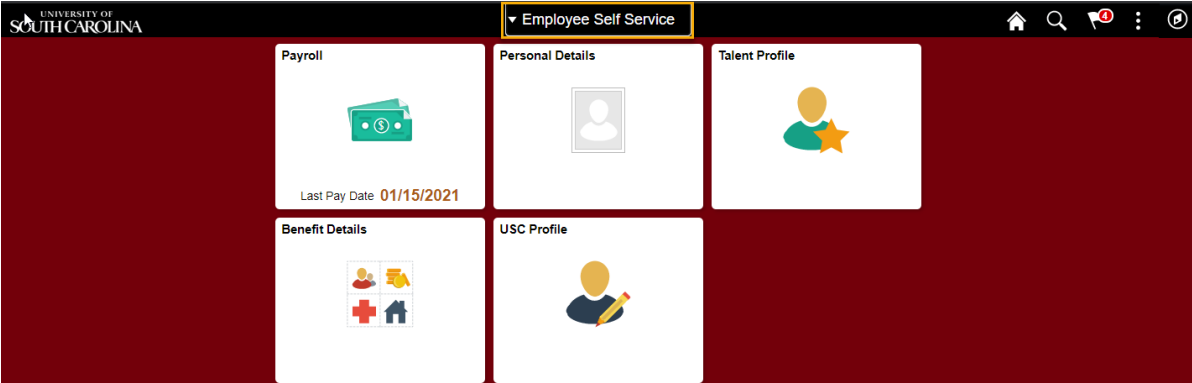
How to view Aging eForm Summary in HCM PeopleSoft:
 This job aid outlines the process for those with initiator and approver access to view summary and overview data for aging eForms in HCM PeopleSoft. This data is presented to assist your internal workflows to ensure no eForm is forgotten/overlooked.

Processing Steps

Screenshots

Step 1: On the main homepage, click the **Employee Self Service** drop-down menu button.

Step 2: Click the **My Workplace** drop-down menu button.



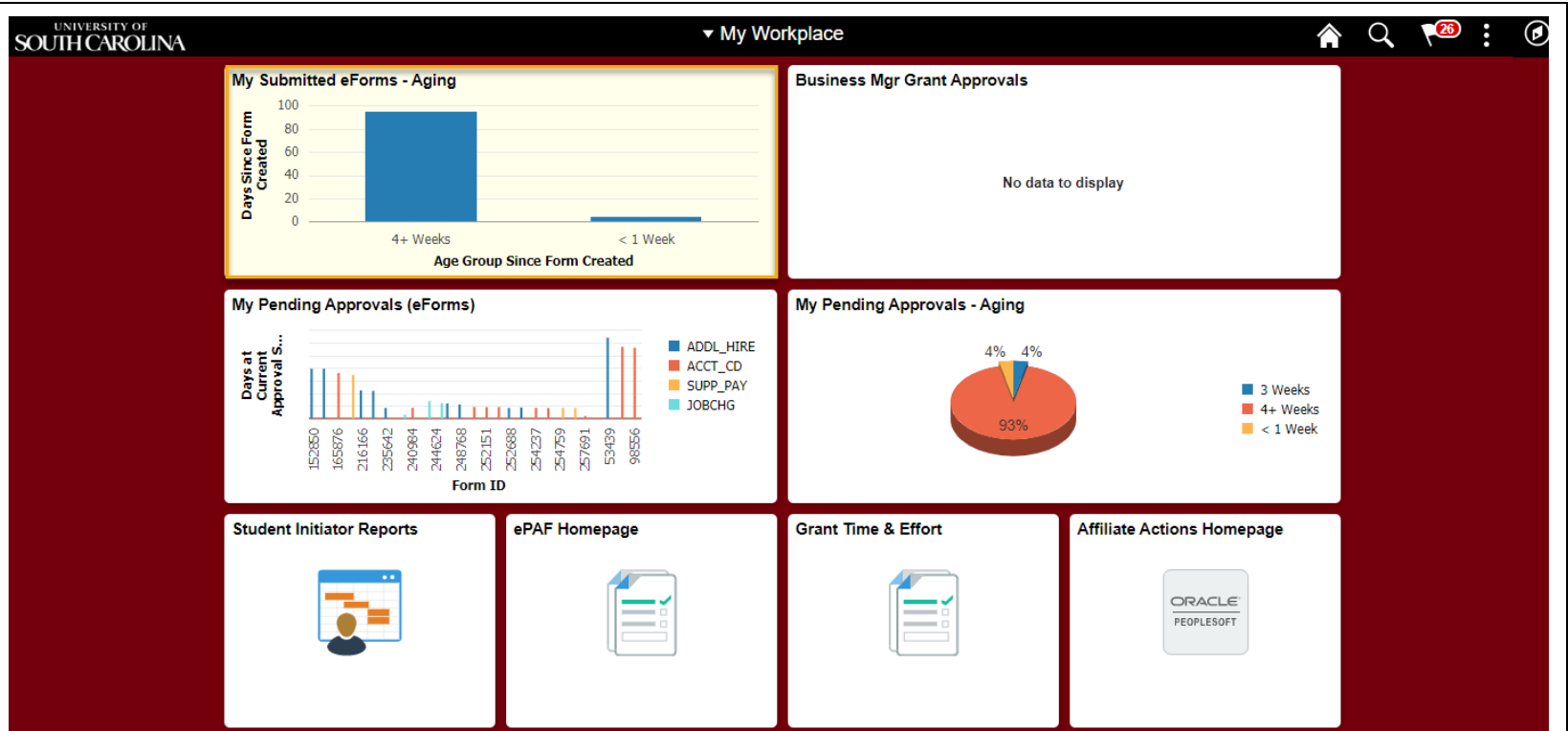
Step 3: Aging eForms and Aging Approvals in My Workplace

There are three tiles on **My Workplace** available to Initiators and Approvers to quickly reference aging eForms:

- My Submitted eForms – Aging
- My Pending Approvals (eForms)
- My Pending Approvals - Aging

In the next three steps we will review the data available in each of the previously mentioned categories.

Click the **My Submitted eForms - Aging** tile.



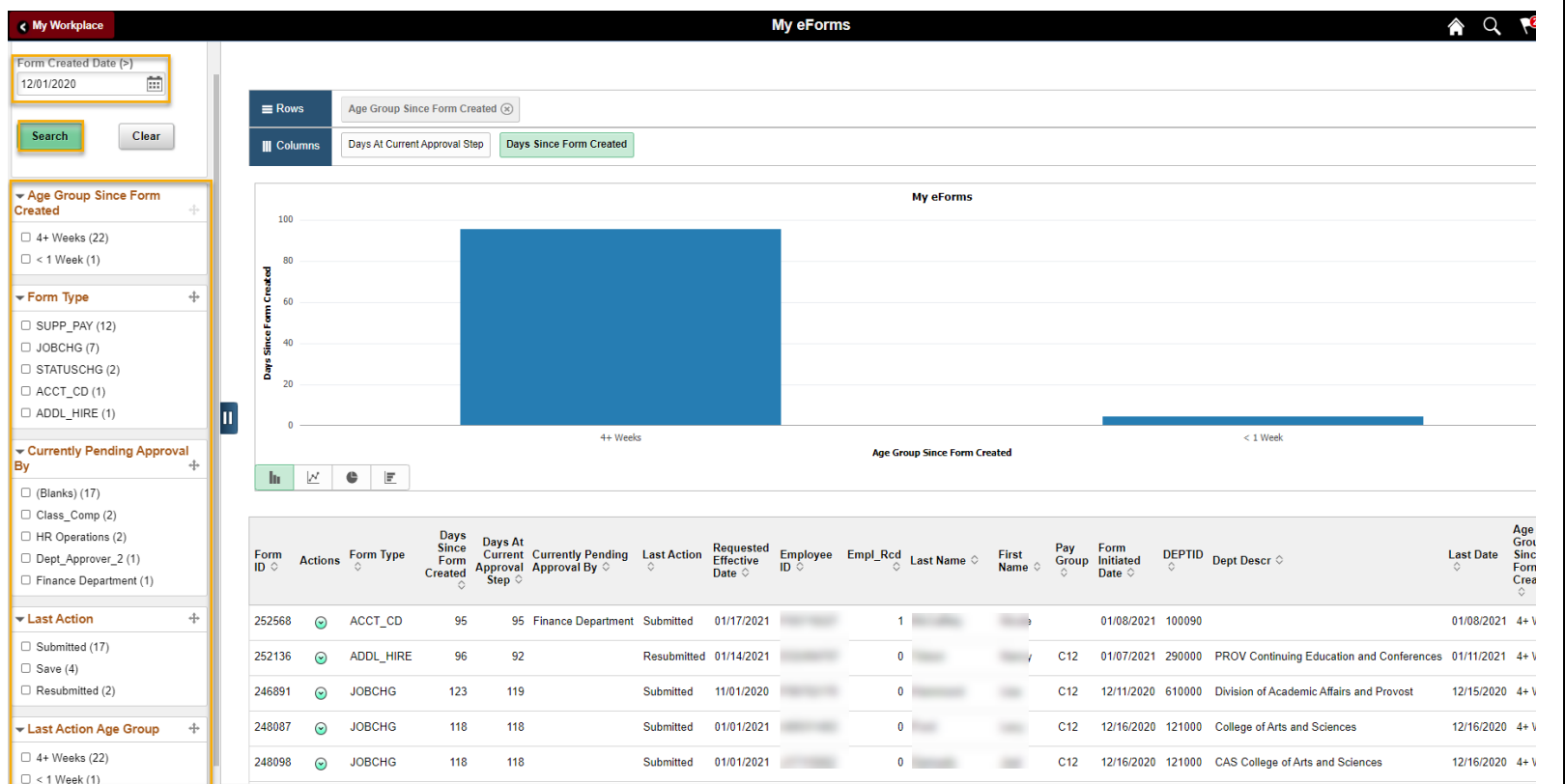
Step 4: The My Submitted eForms-Aging page shows status and summary for pending aging eForms that you initiated.

The only required search parameter is the **Form Created Date (>)**. The data presents with **Number of Weeks** on the X axis and **Days Since Form Created** on the Y axis. Note you can filter data by making selections on the left side menu:

- Age Group Since Form Created
- Form Type
- Currently Pending Approval By
- Last Action
- Last Action Age Group

You can change the chart view type from a bar graph (default) to a line chart, pie chart, or change the axis of the bar graph.

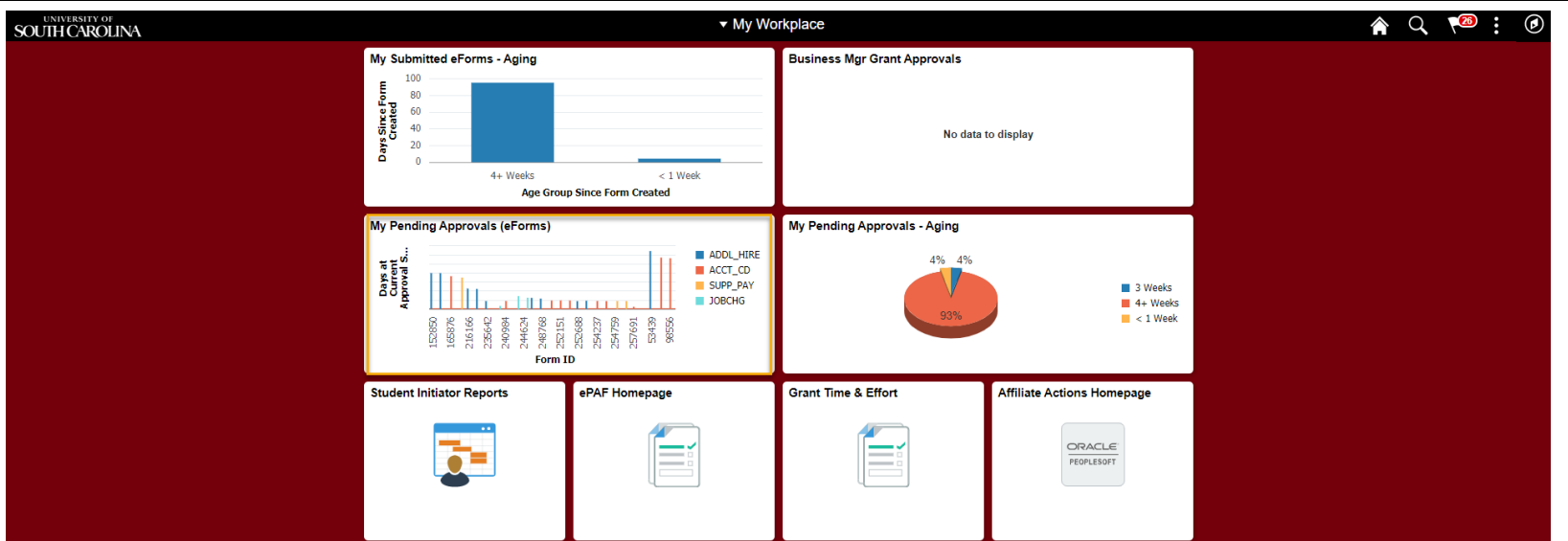
Below the graph on this page is a detailed breakdown for each eForm included in the search results. Note you must scroll to the right to see all data.



Form ID	Actions	Form Type	Days Since Form Created	Days At Current Approval Step	Currently Pending Approval By	Last Action	Requested Effective Date	Employee ID	Empl_Rcd	Last Name	First Name	Pay Group	Form Initiated Date	DEPTID	Dept Descr	Last Date	Age Grp Sinc Form Crea
252568		ACCT_CD	95	95	Finance Department	Submitted	01/17/2021		1			C12	01/08/2021	100090		01/08/2021	4+ W
252136		ADDL_HIRE	96	92		Resubmitted	01/14/2021		0			C12	01/07/2021	290000	PROV Continuing Education and Conferences	01/11/2021	4+ W
246891		JOBCHG	123	119		Submitted	11/01/2020		0			C12	12/11/2020	610000	Division of Academic Affairs and Provost	12/15/2020	4+ W
248087		JOBCHG	118	118		Submitted	01/01/2021		0			C12	12/16/2020	121000	College of Arts and Sciences	12/16/2020	4+ W
248098		JOBCHG	118	118		Submitted	01/01/2021		0			C12	12/16/2020	121000	CAS College of Arts and Sciences	12/16/2020	4+ W

Step 5a: Click the My Pending Approvals (eForms) tile.

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My Submitted eForms - Aging

Age Group Since Form Created	Days Since Form Created
4+ Weeks	~90
< 1 Week	~5

Business Mgr Grant Approvals

No data to display

My Pending Approvals (eForms)

Form ID	Days at Approval S...	Category
1328502	~10	ACCT_CD
165876	~10	ACCT_CD
216166	~10	ACCT_CD
235642	~10	ACCT_CD
240094	~10	ACCT_CD
244624	~10	ACCT_CD
248768	~10	ACCT_CD
252151	~10	ACCT_CD
252688	~10	ACCT_CD
254237	~10	ACCT_CD
254729	~10	ACCT_CD
2577691	~10	ACCT_CD
534039	~10	ACCT_CD
98556	~10	ACCT_CD

My Pending Approvals - Aging

Age Group	Percentage
3 Weeks	4%
4+ Weeks	4%
< 1 Week	93%

Student Initiator Reports

ePAF Homepage

Grant Time & Effort

Affiliate Actions Homepage

Step 5b: The My Pending Approvals (eForms) page shows status and summary for eForms that are pending review/approval at a workflow state to which you have approval authority.

There are no required search parameters. The data presents with **Form ID** on the X axis and **Days at Current Approval Step** on the Y axis. Note you can filter data by making selections on the left side menu:

- Form Type
- Form ID
- Currently Pending Approval By

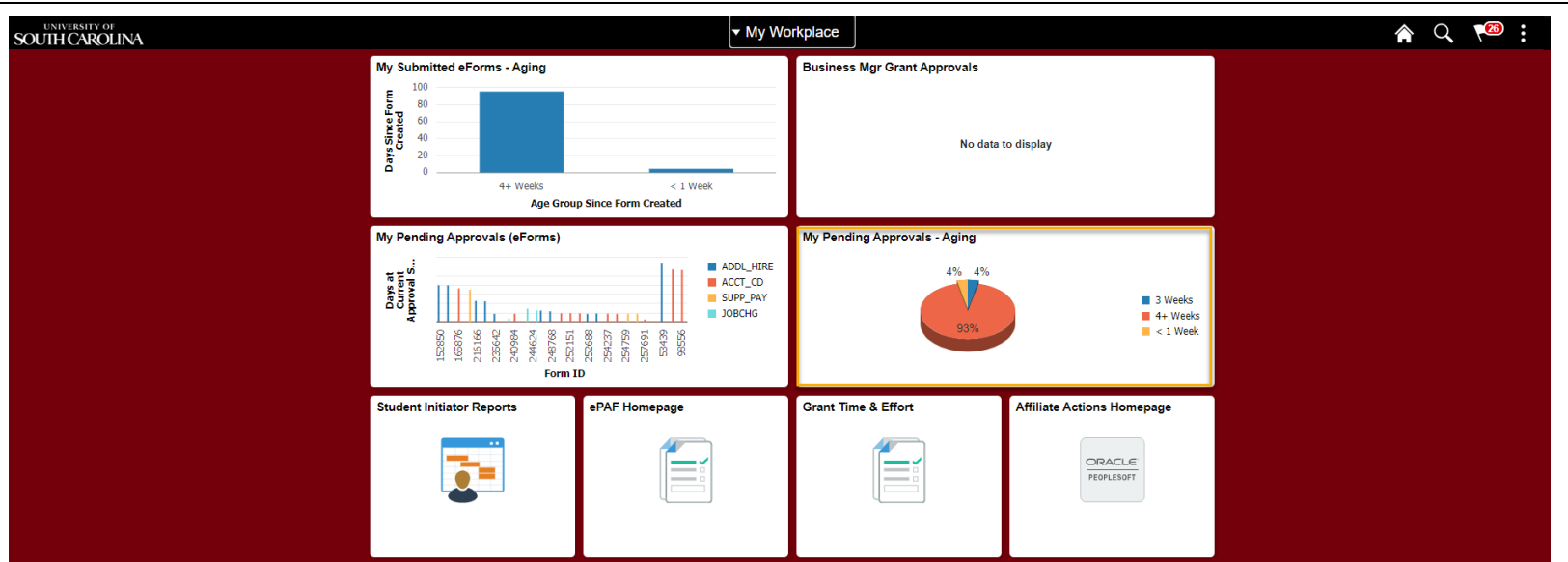
You can change the chart view type from a bar graph (default) to a line chart or change the axis of the bar graph.

Below the graph on this page is a detailed breakdown for each eForm included in the search results. Note you must scroll to the right to see all data.



Step 6a: Click the My Pending Approvals - Aging tile.

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The screenshot displays the 'My Workplace' dashboard with the following components:

- My Submitted eForms - Aging:** A bar chart showing the number of days since forms were created. The '4+ Weeks' category has approximately 90 forms, while the '< 1 Week' category has approximately 10 forms.
- Business Mgr Grant Approvals:** A message indicating 'No data to display'.
- My Pending Approvals (eForms):** A grouped bar chart showing 'Days at Current Approval S...' for various Form IDs. The categories include ADDL_HIRE, ACCT_CD, SUPP_PAY, and JOBCHG.
- My Pending Approvals - Aging:** A pie chart showing the distribution of pending approvals by age group: 93% for 4+ Weeks, 4% for 3 Weeks, and 4% for < 1 Week.
- Student Initiator Reports:** A tile with a person icon and a report icon.
- ePAF Homepage:** A tile with a document icon and a checkmark.
- Grant Time & Effort:** A tile with a document icon and a checkmark.
- Affiliate Actions Homepage:** A tile with the ORACLE PEOPLESOFT logo.

Step 6b: The My Pending Approvals - Aging page shows additional detail for the information also presented in *the My Pending Approvals (eForms)* tile.

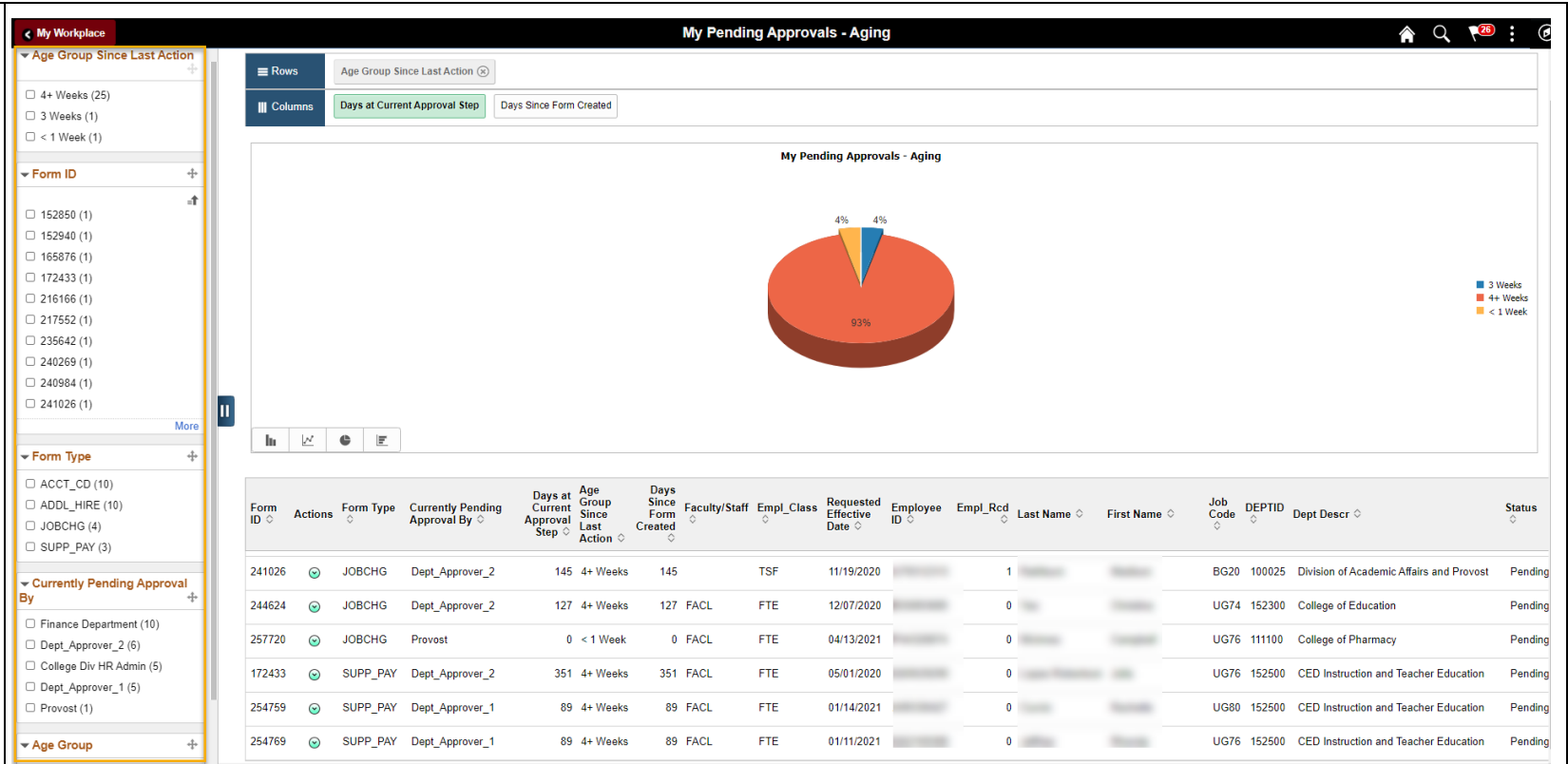
There are no required search parameters. Note you can filter data by making selections on the left side menu:

- Age Group Since Last Action
- Form ID
- Form Type
- Currently Pending Approval By
- Age Group

You can change the chart view type from a pie chart (default) to a line chart or bar graph.

Below the graph on this page is a detailed breakdown for each eForm included in the search results. Note you must scroll to the right to see all data.

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My Pending Approvals - Aging

Age Group Since Last Action

- 4+ Weeks (25)
- 3 Weeks (1)
- < 1 Week (1)

Form ID

- 152850 (1)
- 152940 (1)
- 165876 (1)
- 172433 (1)
- 216166 (1)
- 217552 (1)
- 235642 (1)
- 240269 (1)
- 240984 (1)
- 241026 (1)

Form Type

- ACCT_CD (10)
- ADDL_HIRE (10)
- JOBCHG (4)
- SUPP_PAY (3)

Currently Pending Approval By

- Finance Department (10)
- Dept_Approver_2 (6)
- College Div HR Admin (5)
- Dept_Approver_1 (5)
- Provost (1)

Age Group

My Pending Approvals - Aging

93% 4% 4%

Form ID	Actions	Form Type	Currently Pending Approval By	Days at Current Approval Step	Age Group Since Last Action	Days Since Form Created	Faculty/Staff	Empl_Class	Requested Effective Date	Employee ID	Empl_Rcd	Last Name	First Name	Job Code	DEPTID	Dept Descr	Status
241026		JOBCHG	Dept_Approver_2	145	4+ Weeks	145	TSF		11/19/2020		1			BG20	100025	Division of Academic Affairs and Provost	Pending
244624		JOBCHG	Dept_Approver_2	127	4+ Weeks	127	FACL	FTE	12/07/2020		0			UG74	152300	College of Education	Pending
257720		JOBCHG	Provost	0	< 1 Week	0	FACL	FTE	04/13/2021		0			UG76	111100	College of Pharmacy	Pending
172433		SUPP_PAY	Dept_Approver_2	351	4+ Weeks	351	FACL	FTE	05/01/2020		0			UG76	152500	CED Instruction and Teacher Education	Pending
254759		SUPP_PAY	Dept_Approver_1	89	4+ Weeks	89	FACL	FTE	01/14/2021		0			UG80	152500	CED Instruction and Teacher Education	Pending
254769		SUPP_PAY	Dept_Approver_1	89	4+ Weeks	89	FACL	FTE	01/11/2021		0			UG76	152500	CED Instruction and Teacher Education	Pending

Step 6c: The My Pending Approvals - Aging continued.

To drill down further into the data presented in the pie chart, click one of the sections. On the **Actions** menu, click **Detailed View**.

The data that populates below the pie chart is then limited to only those eForms that fall into the criteria you selected. In this scenario we selected **Detailed View** of eForms over 4 weeks old.

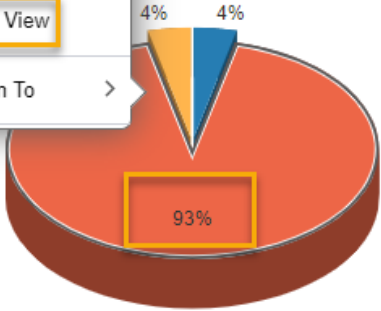
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My Pending Approvals - Aging

Actions ✕

Detailed View

Drilldown To >



Form ID	Actions	Form Type	Currently Pending Approval By	Days at Current Approval Step	Age Group Since Last Action	Days Since Form Created	Faculty/Staff	Empl_Class	Requested Effective Date	Employee ID	Empl_Rcd	Last Name	First Name	Job Code	DEPTID	Dept Descr	Status
98556		ACCT_CD	Finance Department	565	4+ Weeks	566			09/29/2019		0				152200		Pend
152850		ADDL_HIRE	College Div HR Admin	399	4+ Weeks	399		DLI	05/11/2020		0			UG70	152100	CED Physical Education	Pend
152940		ADDL_HIRE	College Div HR Admin	399	4+ Weeks	399		DLI	06/22/2020		0			UG70	152100	CED Physical Education	Pend
216166		ADDL_HIRE	College Div HR Admin	228	4+ Weeks	228		DLI	10/01/2020		0			XN05	152000	CED College of Education	Pend
217552		ADDL_HIRE	College Div HR Admin	224	4+ Weeks	224		DLI	10/01/2020		0			UG83	152000	CED College of Education	Pend

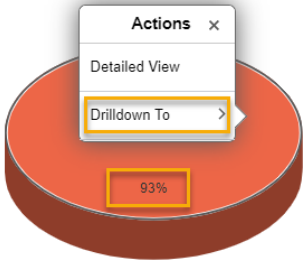
Step 6c: The My Pending Approvals - Aging continued.

To drill down further into the data presented in the pie chart, click one of the sections. On the **Actions** menu click **Drilldown To**.

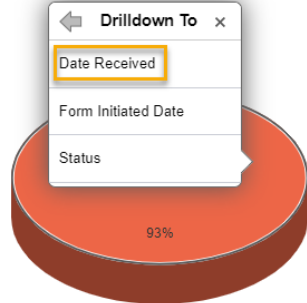
In this scenario we clicked the **Date Received** option in the **Drilldown To** menu, which then presented the bottom multi-color pie chart showing breakdown for eForms by date received at the current workflow step.

Note additional data populates below the pie chart then only shows those eForms that fall into the criteria you selected.

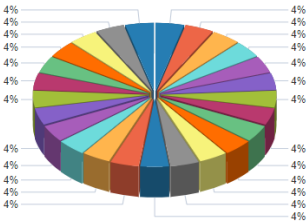
My Pending Approvals - Aging



My Pending Approvals - Aging



My Pending Approvals - Aging



Form ID	Actions	Form Type	Currently Pending Approval By	Days at Current Approval Step	Age Group Since Last Action	Days Since Form Created	Faculty/Staff	Empl_Class	Requested Effective Date	Employee ID	Empl_Rcd	Last Name	First Name	Job Code	DEPTID	Dept Descr	Status	Form Initiated Date	Date Received
165876		ACCT_CD	Finance Department	365	4+ Weeks	365			04/16/2020		1				152000		Pendin	04/13/2020	2020-04-13-19.25.58.000000
240984		ACCT_CD	Finance Department	90	4+ Weeks	145			01/16/2021		0				115500		Pendin	11/19/2020	2021-01-13-15.33.56.000000
252031		ACCT_CD	Finance Department	96	4+ Weeks	96			01/17/2021		0				135800		Pendin	01/07/2021	2021-01-07-10.49.08.000000
252151		ACCT_CD	Finance Department	96	4+ Weeks	96			02/01/2021		0				135500		Pendin	01/07/2021	2021-01-07-11.42.45.000000
252568		ACCT_CD	Finance Department	95	4+ Weeks	95			01/17/2021		1				100090		Pendin	01/08/2021	2021-01-08-13.12.45.000000
254237		ACCT_CD	Finance Department	90	4+ Weeks	90			01/16/2021		0				126100		Pendin	01/13/2021	2021-01-13-16.49.56.000000
254666		ACCT_CD	Finance Department	89	4+ Weeks	89			01/16/2021		0				115400		Pendin	01/14/2021	2021-01-14-13.09.21.000000