

MANAGE WORKFLOW-

# RELATED



## CONFIGURATION

**QUICK REFERENCE GUIDE EX-12** 

#### Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Manage Workflow-Related Configuration in the North Carolina Financial System (**NCFS**).

#### Introduction and Overview

This QRG covers the steps to add, delete, and update the conditions of Accounts Payable (**AP**) Invoice Approval Rules in NCFS.

#### Manage Workflow-Related Configuration

To Manage Workflow-Related Configuration in NCFS, please follow the steps below:

- 1. Log in to the NCFS portal with your credentials to access the system.
- 2. In the top right corner of **Home** page, Click the **Notifications** icon [ 4].

≡ <b>CRCFS</b>	)					△ ☆	
	Good after	noon,					
<	Cash Management	Fixed Assets	Expenses	Procurement	My Enterprise	Tools	>
	QUICK ACTIONS		APPS				



3. On the **Notifications** page, Click the **Worklist** button.

<	Notifications	Worklist
	Assigned to Me (6) Created by Me (0) All	
	Q Search Dismiss All	
	<ul> <li>The payment process request 1400 is now in status Waiting for payment file processing.</li> </ul>	
	Dismiss	

4. In the top right corner of the **BPM Worklist** page, click the drop-down choice list icon [ ] and select **Administration**.

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	User Details	
	Home	
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	Help 🕨	
	Logout	

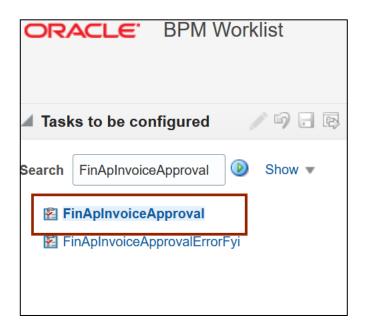
5. In the top right corner of the **BPM Worklist** page, click the **Task Configuration** button.

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Public Flex Fields Protected Flex Fields	Login page realm label	LABEL_LOGIN_	REALM			^
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٠	Enable Delegate/automatic outcome setting in vacation rules	🗴 🗿 Enabled 🔿 D	isabled			
	User Name format	t 🔿 User Id 🧿 Us	er Name			
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6. Enter the Search field and click the Search [ ) icon. In this example, we choose **FinApInvoiceApproval.** 

Administration Ex			
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Search FinApInvoiceApproval D Show 💌			
No Task types found. Change search criteria.			

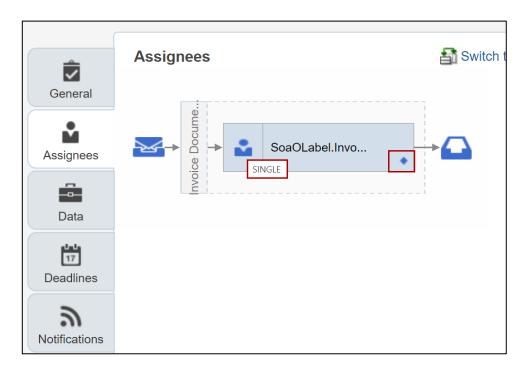
7. Select the FinApInvoiceApproval Task.



8. Click the **Edit** [ ] icon to update the Invoice Approval Configuration and click the **Assignees** tab to open the Invoice Business Rules.

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	Data	Description			

9. Click the **Single Participant** [<sup>2</sup>] button and click the **Go to Rule** [<sup>1</sup>] icon.



10. Select the **Go to Rule** option to view rules.

General	Assignees
Assignees	SoaOLabel.Invo
Data	SoaOLabel.InvoiceApproversfinal
Deadlines	Basic Advanced
Notifications	SoaOLabel.InvoiceAppr
Access	Asignees based on Rule-based V
Configuration	Business rule InvoiceApprovalRules

11. Under the *Rules* section, select the **Rule name** you wish to update.

In this example, we choose Employee Supervisor.

General	Go back to Assignees	
	🗞 Rules 📄 Value Sets 🚯 Globals 🖌	Advanced >
Assignees	InvoiceApprovalRules View Properties	
Data	Rules △ ▼ By Type ▼	Employee Supervisor Properties
Deadlines	Search By Alias	🕂 💌 💥 🖓 🔑 🚜 💌 🏶 💌
2	Search By Alias	the following test is true ⊿
Notifications	Requester not exist	Invoice Header.Business Unit Name starts with "0500" or
19	Reject self approval	Invoice Header.Business Unit Name starts with "1400" or
Access	Auto Approve by BU	Invoice Header.Business Unit Name starts with "B100" THEN
Configuration	Requester routing	<b>+</b> ▼ ※ ☆ ↓ ₩ ▼
	Employee Supervisor	

#### 12. Click on the **individual condition** to update.

In this example, we choose Invoice Header.Business Unit Name starts with "B100".

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General	General InvoiceApprovalRules View Properties				
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Deadlines	Requester not exist	Invoice Header.Business Unit Name starts with "0500" or			
ッ	Reject self approval	Invoice Header.Business Unit Name starts with "1400" or			
Notifications	Auto Approve by BU	Invoice Header.Business Unit Name Starts with Starts with B100"			
Access	Requester routing	THEN			
Configuration	Employee Supervisor	💠 🔻 🛠 🖓 🐥 😹 👻			

13. To update the Business Unit code, Enter the appropriate Business Unit code in the **Value** field.

In this example, we choose "B200".

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InvoiceApprovalRules  View Pr	operties
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Search By Alias	the following test is true
Requester not exist	Invoice Header.Business Unit Name starts with "0500" or
Reject self approval	Invoice Header.Business Unit Name starts with "1400" or "B200"
Auto Approve by BU	Invoice Header.Business Unit Name Starts with V B200"
Requester routing	THEN
Employee Supervisor	💠 🔻 🛠 🖓 😽 🐱
Auto Approve by Source	List Builder Supervisory

14. Click the **Delete** icon [ **X** ] to delete a condition.

In this example, we choose Invoice Header.Business Unit Name starts with "0500".

Ê	General     Value Sets     S Globals     Advanced >       InvoiceApprovalRules     View Properties				
Assignees	Rules 🖂 🤜 By Type 💌	Employee Supervisor Properties			
Data	<b>-+</b> × × × -	" ♣ ▼ X G ♣ X ▼ ◎ ▼			
	Search By Alias	the following test is true			
Deadlines	🔶 Requester not exist	Invoice Header.Business Unit Name Starts with V 10500"			
ッ	Reject self approval	Invoice Header.Business Unit Name starts with "1400" or			
Notifications	Auto Approve by BU	Invoice Header.Business Unit Name starts with "B200"			
Access	Requester routing	THEN			
\$	Employee Supervisor	💠 🔻 🛠 🔂 😽 🗮 👻			

15. Select the **simple test** option from the drop-down choice list of **Advanced Add or Modify Options** to add a new condition in the existing approval rule.

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🔶 Requester not exist	variable Business Unit Name starts with "1400" or
🔶 Reject self approval	nested test Business Unit Name starts with "B200"
Auto Approve by BU	
Requester routing	· · · · · · · · · · · · · · · · · · ·
Employee Supervisor	List Builder Supervisory
Auto Approve by Source	Response Type   Required   FYI

16. Enter the condition in the *condition* field.

In this example, choose "Invoice Header.Business Unit Name" for the condition.

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Reject self approval	Invoice Header.Business Unit Name starts with "B200" or
🔶 Auto Approve by BU	Invoice Header.Business Unit Name Sis State Enter text to search
Requester routing	THEN
Employee Supervisor	💠 🔻 🛠 🖓 😽 🐱

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17. Select the corresponding *operator* from the drop-down choice list.

In this example, we choose **starts with** for the *operator*.

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Rules Sets	Glob	als Advanced >	is isn't more than	
InvoiceApprovalRules  View	Prope	rties	same or more than	
Dulue			less than	
Rules 🗠 🔻 By Type 💌		Employee Supervisor Properties	same or less than	
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		<		
🔶 Requester routing		THEN		
Employee Supervisor		🕂 🔻 💥 🗘 🐥 🕌 👻		

18. Enter the **condition value** in the *value* field.

In this example, we choose "B500" as the condition value.

Employee Supervisor Properties IF	
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e following test is true	
Invoice Header.Business Unit Name starts with "1400" or	
Invoice Header.Business Unit Name starts with "B200" or	
Invoice Header.Business Unit Name Starts with V "B500"	2

19. Click the **Validate** button to validate the rules.

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iew Properties		
T Em	ployee Supervisor Properties	
IF		
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4	the following test is true	
	Invoice Header.Business Unit Name starts with "1400" or	
	Invoice Header.Business Unit Name starts with "B200" or	
	Invoice Header.Business Unit Name	Q
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20. Review the **Validation log** at the bottom of the **Rules** section to check if there are any errors/warnings found. Correct the rules and re-validate in case of any errors/warnings found.

Auto Approve by BU	Invoice Header.Business Unit Name	starts with V "B500"
🔶 Requester routing	THEN	
Employee Supervisor	💠 💌 🛠 🖓 🐥 🚜 📼	
Auto Approve by Source	List Builder Supervisory	
Auto Approve by 3Way	Response Type <b>O</b> Required <b>O</b> FYI Number of levels          Number of levels       1         Starting Participant       HierarchyBuilder.getMai	
Business Rule Validation - Log		
Message		Dictionary Object
No validation errors/warnings fou	ıd!	

21. In the top left corner of the **BPM Worklist** page, click on the **Save** icon [ ] to save the changes.

Tasks to be	Î	Go back to Assignees					
FinApInvoiceApproval     FinApInvoiceApproval     FinApInvoiceApproval	General Assignees	InvoiceApprovalRules     View Properties					
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	19	Reject self approval	Invoice Header.Business Unit Name starts with "B200" or				
	Access	Auto Approve by BU	Invoice Header.Business Unit Name Starts with Starts with Starts with				

22. On the *Enter Comments* pop-up page, enter appropriate comments and click the **OK** button.

	Enter Comments	×
	Comments	
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23. Information pop-up appears as a confirmation to save the changes. Click the **OK** button.

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	Data	Description				

24. Click on the **Commit Task** icon [

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			Admin
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<ul> <li>FinApInvoiceApproval</li> <li>FinApInvoiceApprovalErrorFyi</li> </ul>	Assignees	Title	RequiresApprova
	•	Description	
	Data	Outcomes	APPROVE,REJECT,HtOutcmeForceApproveForceApprov
	Deadlines		

25. On the Enter Comments pop-up page, enter appropriate comments and click the **OK** button.

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Approval changes are completed	
Approval changes are completed	
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26. *Information* pop-up appears as a confirmation to deploy the changes. Click the **OK** button.

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Search FinApInvoiceApproval	General		н	<ol> <li>TaskEditor Data Saved Successfully</li> <li>TaskEditor Data commited Successfully</li> </ol>	
FinApInvoiceApproval	<b>1</b>	Title	01 R	OK	
FinApInvoiceApprovalErrorFyi	Assignees			UK .	
	-	Description			
	Data				
		Outcomes	AP	PROVE REJECT HtOutcmeForceApproveForc	eApproveIn

### Wrap-Up

Managing Workflow-Related Configuration using the steps above to add, delete, and update the conditions of AP Invoice Approval Rules in the NCFS.

#### Additional Resources

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