

Workflow Approval Roles in Finance

Transactions that are submitted approval are routed to users who have been assigned the workflow approval roles. Approval roles, usually starting with “ZZ_AW” require that the Route Control be selected. If the route control is not selected when the role is assigned, then the user will not be included in workflow routing for their Business Unit.

The screenshot shows a 'User Roles' table with columns: Role Name, Description, Dynamic, and View. The 'Route Control' column is highlighted in red. A dialog box titled 'User Route Control Profiles' is open, showing 'Role Name: ZZ_AW_AP_MANAGER' and a search for 'Route Control Profile' with 'CTC_BUSINESS_UNIT_WA000' selected. The dialog has 'OK' and 'Cancel' buttons.

Role Name	Description	Dynamic	View
ZZ_AW_AP_MANAGER	ZZ_AW_AP_MANAGER	<input type="checkbox"/>	Route Control
ZZ_AW_AP_REVIEW	AP Review Approval	<input type="checkbox"/>	Route Control
ZZ_AW_BI_INV	ZZ_AW_BI_INV	<input type="checkbox"/>	Route Control
ZZ_AW_BUDGT_JRNL	ZZ_AW_BUDGT_JRNL_APPROVER	<input type="checkbox"/>	Route Control
ZZ_AWE_ADMIN_000	ZZ_AWE_ADMIN_000	<input type="checkbox"/>	Route Control
ZZ_AW_EXEC_LEVEL	Executive Level 1 Approval	<input type="checkbox"/>	Route Control

In addition to the “ZZ_AW” approval roles, the following roles require a route control:

- ZZ_AW_BI_INV (AR Billing Approval)
- ZZ CC Budget Approval
- ZZ GL Journal Approval
- ZZ GL Jrnl Accountnt Approval

For example, the ZZ GL Journal Approval role is configured as part of that AWE’s User List ZZ_UL_AWE_APPROVAL that does require a route control for workflow:

The screenshot shows the 'User List Definition' configuration for 'ZZ_UL_AWE_APPROVAL'. The 'User List Source' is set to 'Role' with 'Role Name' 'ZZ GL Journal Approval'. The 'Route Control Attributes' section shows 'Route Control Profile' 'CTC_BUSINESS_UNIT_ALL' and 'Record Name' 'JRNL_AF_HDR_VW'. A table below shows 'Route Control Type' 'CTC_BUSINESS_UNIT' and 'Field Name' 'BUSINESS_UNIT'.

User List Definition

User List: ZZ_UL_AWE_APPROVAL
*Description: GL Journal Approvals-ZZ Role

User List Source

Role Role Name: ZZ GL Journal Approval
 SQL Definition
 Query
 Application Class

Route Control Attributes

Route Control Profile: CTC_BUSINESS_UNIT_ALL
Record Name: JRNL_AF_HDR_VW

Route Control Type	Field Name
1 CTC_BUSINESS_UNIT	BUSINESS_UNIT

Approval Roles that Do Not Require a Route Control

The ZZ Requisition, Purchasing and Voucher Approval roles are not included in the AWE Process Setup User Lists for workflow routing; instead, they provide menu path navigation and approval features.

- ZZ Requisition Approval
- ZZ Purchasing Approval
- ZZ Voucher Approval
- ZZ Treasury Approvals
- ZZ Expenses Approval

Expenses Approval does have an AWE (approval workflow engine), however the User List uses an Application Class, rather than a role that requires route control settings. The T&E workflow is managed using Approver Assignment tables and HR Supervisor data.

The screenshot shows a 'User List Definition' form. At the top, the 'User List' is set to 'Expense Report Approvers' and the '*Description' is 'Expense Report Approver List'. Below this, the 'User List Source' section has four radio button options: 'Role', 'SQL Definition', 'Query', and 'Application Class'. The 'Application Class' option is selected and highlighted in yellow. To the right of these options are two input fields: 'Root Package ID' with the value 'EX' and 'Application Class Path' with the value 'Approval:List:ERApproverList'. Both input fields have a magnifying glass icon on the right side.

If a route control is assigned to a role that is not included in the AWE Process Setup/User Lists, then it is not necessary to remove it. The added route control will affect workflow routing.

If a route control is not assigned to a role that is used for AWE routing, then the approval request will not route to the user as expected. An error step will occur and the approval request will either route to the AWE administrator or route to the next step (depending on how the AWE Process Setup is configured to handle errors).

The route control assigned for AWE related roles should be reviewed if the user is transferring from another ctcLink college. AWE related roles should be removed at the prior college (also removing the route control), then added at the current college with the updated route control.