

PeopleTools 8.56-8.58 Workflow

Agenda

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Developed for developers, analysts and system admins, PeopleSoft PeopleTools v8.56-8.67 Workflow introduces students to create, administer, maintain and troubleshoot workflow items to automate routing and notifications of worklist items in PeopleSoft.

Prerequisites:

- PeopleSoft Query
- Basic Programming knowledge OR PeopleCode
- PeopleTools knowledge

Design Overview

- Process Requirements
- Process Flow
- Building Supporting Application Objects

Create Worklist Records

- Add Required System Fields in Record Definition
- Add Key Fields from Search Record
- Add Fields to Provide Descriptive Worklist Information
- Create database tables

Create New Steps, Activities, and Processes

- Define Business Processes via Navigation Maps
- Create Activities Step
- Create Steps and Step Attributes
- Create Events
- Worklist Definition and Attributes
- Route Control Queries
- Worklist Search Records and Keys
- Email Definition and Routing

Define Roles and Role Users

- Route Control Types
- Route Control Profile
- Linking Route Control Profiles To A Role On A User
- Approval Rule Set
- Rule Step Definition
- Creating Query Roles
- PeopleSoft v8.5x Workflow Training Agenda

Create Workflow Events and Routing

- Workflow Defaults
- Update worklist entries
- User Profile Workflow

Define Event Triggers

- Use of PeopleCode
- Adding Pages to Workflow Component
- Using Virtual Approver
- Use of Application Engine and Component Interface
- Approval Processes in Approval Framework