# 9.2 FSCM Security -Workflow Approval Roles in Finance

Purpose: Use this document as a reference for how to assign Route Control to Workflow Approval roles in the Finance pillar.

For additional context, please see the 9.2 Finance Security Guide

Audience: Finance and Security staff

Workflow Approval Roles in Finance

Transactions that are submitted for 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.
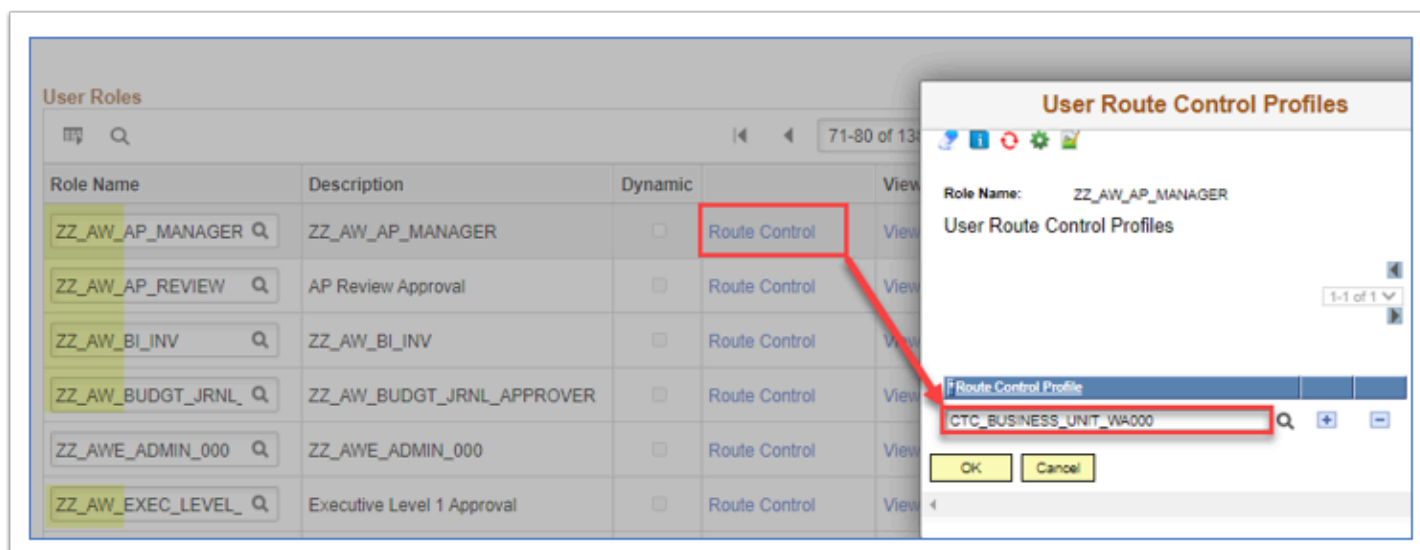
In addition to the "ZZ_AW" approval roles, the following roles require a route control:

- 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 <u>does</u> require a route control for workflow:

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.

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 not 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.