Agenda

Approval Workflow Engine (AWE)

2-Day Course

SPEARMC IS NOW MYTHICS

Approval Workflow Engine

Developed for developers, analysts and system admins, PeopleSoft PeopleTools Approval Workflow Engine training quickly introduces students to the Approval Workflow Engine functionality. Through scenarios, real-world experiences from implementers, and hands-on activities, students learn how to define and configure approval processes using Workflow.

Prerequisites:

- PeopleTools Knowledge
- Workflow

Approval Workflow Engine

- Overview of Approval Framework Engine
- Enterprise Components
- Approval Functionality and Processes
- Approval Features
- Approval Event Handler Class

Configuring Approval Transactions

- Approval Configuration Structure
- The Two-Part Setup Model
- Configure Transactions Overview
- Header Record & Keys
- Ad Hoc Approver Configuration
- Approval Level Configuration
- Notifications & Events
- URL Definitions
- Full Configuration Flow

Defining the Approval Process

- Approval Structure Overview
- Stages, Paths, Steps
- Approver Determination
- Dynamic& Skip Logic
- Route to Requester

Approval Framework Users

- User Lists & Approval Framework Users
- Workflow User Setup
- Role-Based User Lists
- SQL User Lists
- Query-Based User Lists
- Application Class User Lists

Configuring Approval Process Definitions

- Approval Framework Process Definitions
- Approval Process, Path, Steps
- Route to Requester
- Step Approval Flow
- Dynamic Path
- Skip Unauthorized Users

Approval Monitor

- Monitoring Approvals
- User Monitor
- Approval Monitor – Use Cases

SPEARMC IS NOW MYTHICS

Approval Workflow Engine

Administering Workflow Pt.1

- Workflow Definition
- Workflow Elements & Icons
- Business Processes
- Activity, Events & Routing
- Routing Types, Steps & Events
- Worklists & Worklist Records
- Rules, Roles, and Routings
- Steps of Workflow Development
- PeopleCode Function to Trigger Workflow
- TriggerBusinessEvent
- Use Case Examples

Application Engine & Component Interface to Trigger Approvals

- Overview of creating an App- Engine to trigger Workflow
- AE + CI Pattern to Trigger Approvals
- AE + CI → AWE – Troubleshooting (Common Failures)
- Verify, Trace, and Prove It

Administering Workflow Pt.2

- Administering Workflow
- Enabling Timeout Processes
- Running Reports
- Use Case 1: Escalating Approvals with Timeouts
- Use Case 2: Reassigning Abandoned Work Items
- Key Takeaways – Administering Workflow

AWE Security

- What AWE Security Controls
- Three Core Security Layers
- User Profile Requirements for Approvers
- Permission Lists That Influence AWE
- How User Lists Depend on Security
- Delivered AWE Permission Lists
- Delivered AWE Roles and What They Unlocked
- Web Libraries Required for AWE
- Component Access: The Gatekeeper of Approvals
- Record & Table Security Impact on User Lists
- Approval Monitor Access and Administrator Actions
- Worklists, Notifications, and Behind-the-Scenes Security
- Cross-Reference Tables and Why Visibility Matters
- Common Security Failures and How to Spot Them

©2026 SpearMC (now part of Mythics)

SPEARMC IS NOW MYTHICS®

Approval Workflow Engine

AWE PeopleCode

- What PeopleCode Does Inside AWE
- LaunchManager: Where Approvals Begin
- DoSubmit(): The First AWE Action
- SavePostChange: Where Developers Trigger Approvals
- The Approval Event Handler: AWE's Reaction Engine
- Extending the Approval Event Handler
- Application Classes for Dynamic Routing
- PeopleCode Criteria: Conditional Approval Logic
- Step-Level vs. Process-Level PeopleCode
- Dynamic Approver Logic in PeopleCode
- Debugging & Tracing AWE PeopleCode
- Practical PeopleCode Patterns for AWE
- Common PeopleCode Mistakes in AWE
- Real-World Examples of AWE Customizations

Advanced AWE Routing & Dynamic Logic

- Understanding Advanced Routing in AWE
- Static vs Dynamic Routing
- Dynamic Path Selection
- Multi-Level and Multi-Step Approvals
- Parallel Approvals and Multi-Approver Logic
- Skip Logic & Smart Auto-Bypass Behavior
- Using Criteria to Route Based on Business Rules
- Complex Dynamic Routing with SQL & App Classes
- Route to Requester: When Transparency Matters
- Loopbacks, Re-routes & Reassignment Logic

Advanced AWE Routing & Dynamic Logic (cont.)

- Escalation Logic (Deadlines & Reminders)
- Designing Flexible, Future-Proof Routing
- Real-World Routing Examples
- Designing for Maintainability: What to Avoid

Debugging & Troubleshooting

- The Mindset for Debugging AWE
- Diagnosing Routing Failures
- Debugging the Approval Monitor vs. the Worklist.
- Using the AWE Cross-Reference Tables
- Understanding Key Field Failures
- Troubleshooting Criteria Misfires
- Debugging User Lists (The "Who Should Approve?" Problem)
- Debugging the Event Handler
- Troubleshooting Worklist & Notification Issues
- Using Tracing to Follow the AWE Lifecycle
- Analyzing AWE with SQL (Your Best Diagnostic Tool)
- Understanding "Stuck" Approvals
- Putting It All Together: Troubleshooting Framework

©2026 SpearMC (now part of Mythics)

SPEARMC IS NOW MYTHICS®

Approval Workflow Engine

Designing Efficient AWE Approval Processes

- Why Approval Design Matters
- Mapping the Business Process First
- Choosing the Right Approval Pattern
- Designing with Maintainability in Mind
- Naming Conventions & Documentation
- Avoiding Over-Approval
- Using Criteria to Reduce Duplicate Workflows
- Designing Parallel vs. Sequential Approvals
- Designing for Change: Role-Based vs Data-Based Approvals
- Avoiding "Monster Criteria" Expressions
- Designing for Transparency
- Cross-Functional Workflow Design
- Approval Simplification Techniques
- Common Approval Design Pitfalls

AWE Tables, Data Model & Architecture

- Why the AWE Data Model Matters
- The AWE Header: Where Every Approval Begins
- Path Instances: The Stages of the Workflow
- Step Instances: Where the Real Action Happens
- Action History: Runtime Tables, Archive & Audit Tables
- Reviewer Instances: Tracking Additional Approvers
- Comments & Attachments in AWE
- Where AWE Stores Monitor & Status Data
- Relationship Between Header, Path, & Step Instances
- Understanding AWE Metadata Tables
- SQL Queries Every Analyst Should Know
- Data Integrity & Workflow Reliability
- How AWE Uses Keys to Tie Everything Together
- Putting It All Together: The Complete AWE Architecture

©2026 SpearMC (now part of Mythics)