Using ‘Notify’ for Expense Documents

Once an expense report has been submitted, the Notify button becomes available at the bottom of the page. Notify is used to send an email notification to the person(s) that will approve the document (applicable to departments that currently utilize the online Expense Manager Approval feature).

1. Click on the Notify button at the bottom of the page.

2. On the Send Notification page, click on the Lookup Recipient hyperlink. The Recipient should be your departmental approver, not the Controller’s office staff.
3. In the Recipient Search section, enter the last name of the person to whom you want to send the email notification. You can enter a partial name.

4. Click the **Search** button to display a list of names.

5. Click the box under **TO** for the person to whom you want to send the email.

6. Click the **Add to Recipient List** button. That person will now appear in the Recipient List.
7. Repeat steps 3 through 6 for additional recipients, checking the appropriate box to indicate person should be in the To, cc or bcc section.
8. Once all recipients have been added, click **OK** to return to the Send Notification page.

9. Enter the **Subject**. Be sure to include as much information as possible in the Subject, including the TA or ER number.
10. Enter a **Message**. Provide additional information to the recipient.
11. Click **OK**.
The recipient will receive an email notification that will look like this. The email contains a link to the Approval Worklist.

---Original Message---
From: gjoyce@umassp.edu [mailto:gjoyce@umassp.edu]
Sent: Tuesday, March 6, 2018 3:42 AM
To: Mombahari, Megan <mmombahari@umassp.edu>
Cc: Joyce, Charlene <gjoyce@umassp.edu>
Subject: FSLT092: Link in TA Notify email (P92-10344)

Workflow Notification

Priority:

Date Sent: 2018-03-06

Sent To: Mombahari,Megan M/St/M10070693
cc: Joyce,Charlene M/St/M10140942

Please click on the link below to access this transaction (You must be logged into PeopleSoft Finance Application before clicking on link):

Message Text:
Hi Megan,

This is a test to confirm that the link included in this email takes you to the Approval Worklist page.

Would you let me know if the link takes you to the desired page?

Thank you!

Charlene