



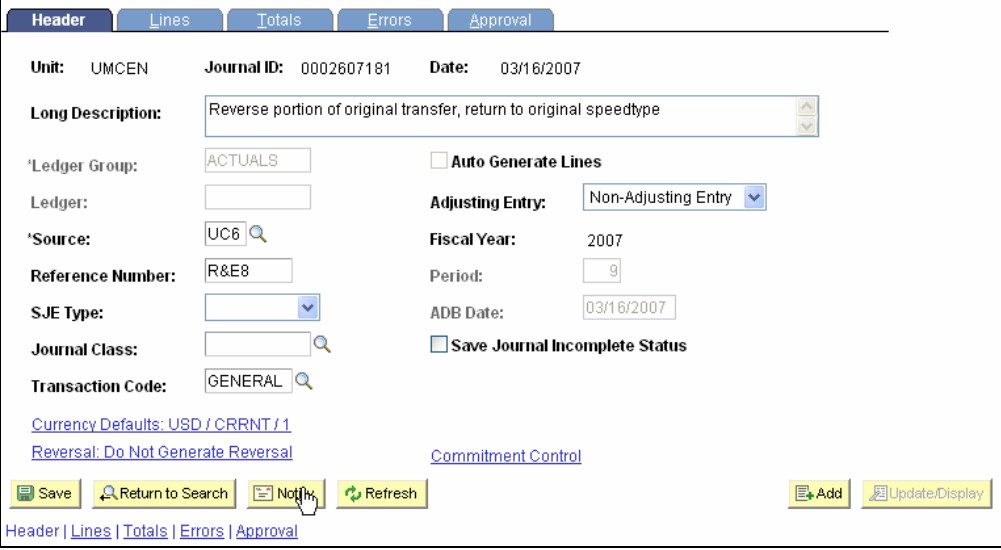

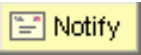
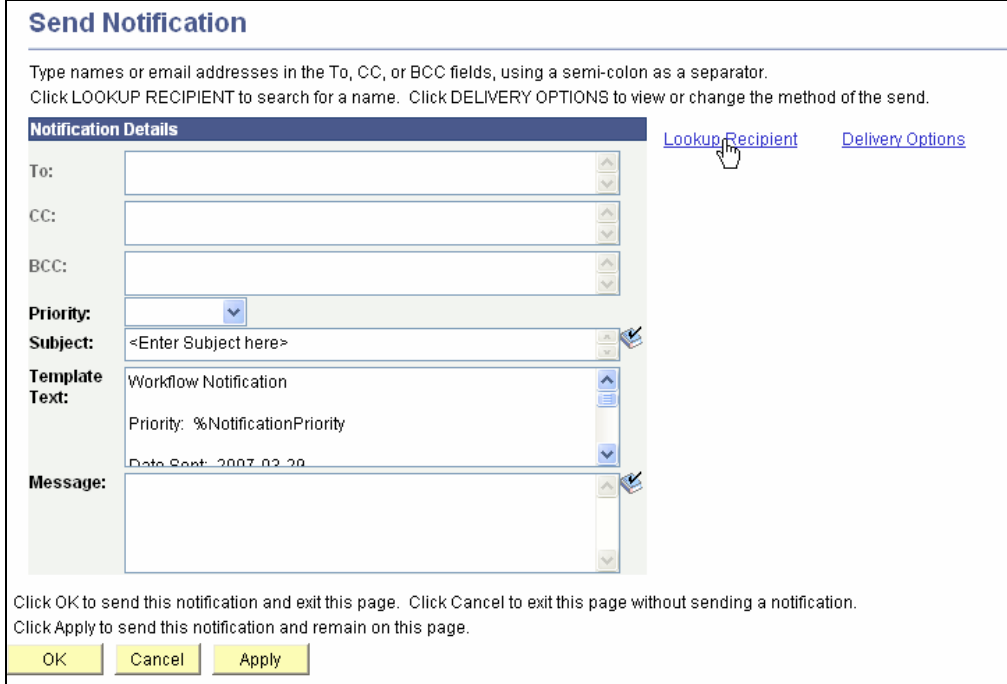


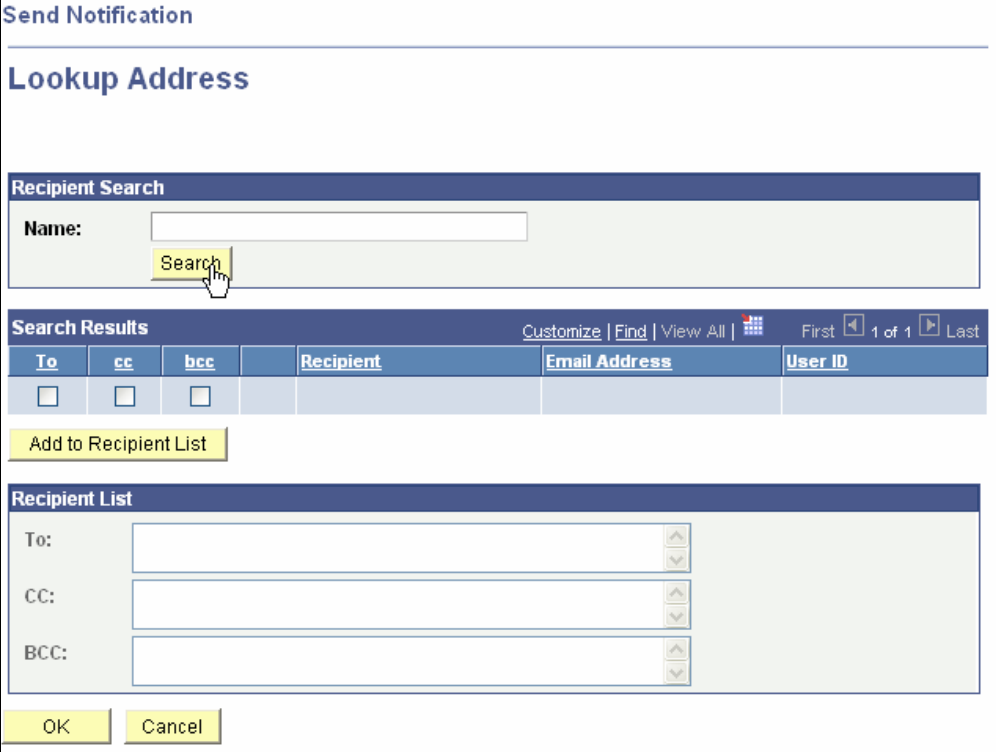

How to Use the Notify Button


	<p>Finance users who work collaboratively on an issue may find that sharing the information on a particular page is useful. The Notify Button is an e-mail utility that can be used to share such information. Selecting the Notify Button on a given page will open the e-mail utility. The sender selects the e-mail recipient from a list of valid users in the Finance system. The recipient receives a message with a link to the page that was sent. If the recipient is logged in and has secure access to this page, then he/she will be brought to that page when the link is selected. If not logged in, then he/she will be prompted to do so.</p>
<p>Step 1.</p>	<p>Log into the e*mpac Finance Production 8.9 Application with your FIN Username and Password.</p>
	<p>Navigate to the appropriate process page.</p> <p><i>In this job aid, the process page used is the General Ledger Journal Entry page at General Ledger – Journals – Journal Entry – Create/Update Journal Entries.</i></p>
	<p>The Create/Update Journal Entries (Add a New Value) page opens.</p> <div data-bbox="391 1014 1393 1451" style="border: 1px solid black; padding: 10px;"> <p>Create/Update Journal Entries</p> <p>Find an Existing Value Add a New Value</p> <hr/> <p>Business Unit: <input type="text"/> </p> <p>Journal ID: <input type="text" value="NEXT"/></p> <p>Journal Date: <input type="text" value="03/15/2007"/> </p> <p>Add</p> <p>Find an Existing Value Add a New Value</p> </div>
<p>Step 2.</p>	<p>Click the Find an Existing Value tab.</p>


	<p>The Create/Update Journal Entries (Find an Existing Value) page opens.</p> <div style="border: 1px solid black; padding: 10px;"> <p>Create/Update Journal Entries Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>Business Unit: [=] <input type="text"/> </p> <p>Journal ID: [begins with] <input type="text"/></p> <p>Journal Date: [=] <input type="text"/> </p> <p>Document Sequence Number: [begins with] <input type="text"/></p> <p>Line Business Unit: [=] <input type="text"/> </p> <p>Journal Header Status: [=] <input type="text"/> [No Status - Needs to be Edited] </p> <p>Budget Checking Header Status: [=] <input type="text"/> </p> <p>Source: [=] <input type="text"/> </p> <p>Search Clear Basic Search Save Search Criteria</p> <p>Find an Existing Value Add a New Value</p> </div>
<p>Step 3.</p>	<p>Enter the appropriate search criteria.</p>
<p>Step 4.</p>	<p>Click the Search button.</p>

	<p>The Journal Entry – Header page opens.</p> 
	<p>You need to notify another user to review the journal entry information.</p>
<p>Step 5.</p>	<p>Click the  button at the bottom of the page.</p>

	<p>The Send Notification page opens.</p> <div data-bbox="391 407 1393 1087">  </div> <p>Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification. Click Apply to send this notification and remain on this page.</p>
<p>Step 6.</p>	<p>Click the Lookup Recipient link.</p>

	<p>The Send Notification (Lookup Address) page opens.</p> 
<p>Step 7.</p>	<p>Enter the recipient's last name in the Name field.</p>
	<p>You can enter in a partial last name, such as the first three letters (i.e. Eng).</p>
<p>Step 8.</p>	<p>Click the Search button.</p>

	<p>The search results appear:</p> <div data-bbox="397 409 1393 699" style="border: 1px solid black; padding: 5px;"> <p>Recipient Search</p> <p>Name: <input type="text" value="England"/> <input type="button" value="Search"/></p> <hr/> <p>Search Results Customize Find View All First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">To</th> <th style="width: 5%;">cc</th> <th style="width: 5%;">bcc</th> <th style="width: 10%;">Recipient</th> <th style="width: 40%;">Email Address</th> <th style="width: 35%;">User ID</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td> England, Kristina D</td> <td>kengland@umassp.edu</td> <td>CKENGLAN</td> </tr> </tbody> </table> <p style="text-align: center;"><input type="button" value="Add to Recipient List"/></p> </div>	To	cc	bcc	Recipient	Email Address	User ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	England, Kristina D	kengland@umassp.edu	CKENGLAN
To	cc	bcc	Recipient	Email Address	User ID								
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	England, Kristina D	kengland@umassp.edu	CKENGLAN								
	<p>You can select from three checkboxes: To, cc, and bcc.</p>												
<p>Step 9.</p>	<p>Select the appropriate checkbox.</p> <div data-bbox="397 863 1393 1180" style="border: 1px solid black; padding: 5px;"> <p>Recipient Search</p> <p>Name: <input type="text" value="England"/> <input type="button" value="Search"/></p> <hr/> <p>Search Results Customize Find View All First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">To</th> <th style="width: 5%;">cc</th> <th style="width: 5%;">bcc</th> <th style="width: 10%;">Recipient</th> <th style="width: 40%;">Email Address</th> <th style="width: 35%;">User ID</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td> England, Kristina D</td> <td>kengland@umassp.edu</td> <td>CKENGLAN</td> </tr> </tbody> </table> <p style="text-align: center;"><input type="button" value="Add to Recipient List"/></p> </div>	To	cc	bcc	Recipient	Email Address	User ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	England, Kristina D	kengland@umassp.edu	CKENGLAN
To	cc	bcc	Recipient	Email Address	User ID								
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	England, Kristina D	kengland@umassp.edu	CKENGLAN								
<p>Step 10.</p>	<p>Click the <input type="button" value="Add to Recipient List"/> button.</p>												

	<p>The recipient is added to the Recipient List section.</p> <div data-bbox="391 405 1385 1167" style="border: 1px solid black; padding: 5px;"> <p>Send Notification</p> <hr/> <p>Lookup Address</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Recipient Search</p> <p>Name: <input type="text" value="England"/> <input type="button" value="Search"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Search Results Customize Find View All First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>To</th> <th>cc</th> <th>bcc</th> <th>Recipient</th> <th>Email Address</th> <th>User ID</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td> England, Kristina D</td> <td>kengland@umassp.edu</td> <td>CKENGLAN</td> </tr> </tbody> </table> <p><input type="button" value="Add to Recipient List"/></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Recipient List</p> <p>To: <input type="text" value="England, Kristina D/CKENGLAN"/></p> <p>CC: <input type="text"/></p> <p>BCC: <input type="text"/></p> </div> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div> </div>	To	cc	bcc	Recipient	Email Address	User ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	England, Kristina D	kengland@umassp.edu	CKENGLAN
To	cc	bcc	Recipient	Email Address	User ID								
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	England, Kristina D	kengland@umassp.edu	CKENGLAN								
<p>Step 11.</p>	<p>Repeat Steps 7-10 to add additional recipients, if needed.</p>												
	<p>To verify the recipient receives the notification, you can choose to copy yourself in the CC: field.</p>												
<p>Step 12.</p>	<p>Click the <input type="button" value="OK"/> button.</p>												

The **Send Notification** page reopens.

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details		Lookup Recipient	Delivery Options
To:	England,Kristina D/CKENGLAN		
CC:	Munroe,John P/UM10008926		
BCC:			
Priority:	<input type="button" value="v"/>		
Subject:	<Enter Subject here>		
Template	Workflow Notification		
Text:	Priority: %NotificationPriority		
Message:	Date Sent: 2007-04-11		

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.






Step 13.

Click the [Delivery Options](#) link.

The **Send Notification – Delivery Options** page opens.






Send Notification

Delivery Options

Recipient Options			
		Customize Find 	First  1-2 of 2  Last
	Recipient	Worklist	Email
	England,Kristina D/CKENGLAN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Munroe,John P/UM10008926	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>





OK Cancel

Step 14. **Deselect** the **Worklist** checkbox for each Recipient.

Recipient Options			
		Customize Find 	First  1-2 of 2  Last
	Recipient	Worklist	Email
	England,Kristina D/CKENGLAN	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Munroe,John P/UM10008926	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

Step 15. Click the **OK** button.

	<p>The Send Notification page reopens.</p> <div data-bbox="391 407 1393 1085" style="border: 1px solid black; padding: 5px;"> <p>Send Notification</p> <p>Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.</p> <p>Notification Details Lookup Recipient Delivery Options</p> <p>To: England,Kristina D/CKENGLAN</p> <p>CC: Munroe,John P/UM10008926</p> <p>BCC:</p> <p>Priority: <input type="button" value="v"/></p> <p>Subject: <Enter Subject here> </p> <p>Template Text: Workflow Notification</p> <p>Priority: %NotificationPriority</p> <p>Date Sent: 2007-04-11</p> <p>Message:</p> <p>Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification. Click Apply to send this notification and remain on this page.</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/></p> </div>
<p>Step 16.</p>	<p>Enter the Priority, if appropriate.</p>
<p>Step 17.</p>	<p>Enter the Subject (i.e. Please Review Journal Entry).</p>
<p>Step 18.</p>	<p>Enter the Message you want the recipient to receive.</p>
	<p>Do not change the Template Text.</p>
	<p>Please note that you can use the spell check icon  to spell check the Subject field and the Message field.</p>

Step 19.

Review the completed **Send Notification** page:

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details [Lookup Recipient](#) [Delivery Options](#)

To: England,Kristina D/CKENGLAN

CC: Munroe,John P/UM10008926

BCC:

Priority: [v]

Subject: Please Review Journal Entry

Template Text: Workflow Notification
Priority: %NotificationPriority
Date Sent: 2007-04-11

Message: Hi,
Please review the following journal entry before I budget check and post. Call me with any questions at 6-1597.

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.

Step 20.

Click the button.

"Processing" will appear in the top right corner of the page.

The **Journal Entry – Header** page reopens.

Header	Lines	Totals	Errors	Approval
Unit: UMCEN	Journal ID: 0002607181	Date: 03/16/2007		
Long Description: Reverse portion of original transfer, return to original speedtype				
Ledger Group: ACTUALS	<input type="checkbox"/> Auto Generate Lines			
Ledger:	Adjusting Entry: Non-Adjusting Entry			
Source: UC6	Fiscal Year: 2007			
Reference Number: R&E8	Period: 9			
SJE Type:	ADB Date: 03/16/2007			
Journal Class:	<input type="checkbox"/> Save Journal Incomplete Status			
Transaction Code: GENERAL				
Currency Defaults: USD / CRRNT / 1 Reversal: Do Not Generate Reversal Commitment Control				
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/>			<input type="button" value="Add"/> <input type="button" value="Update/Display"/>	
Header Lines Totals Errors Approval				



The recipient will receive an email much like the example displayed below:

```

From: jmunroe@umassp.edu                               Sent: Thu 3/29/2007 9:20 AM
To: England, Kristina
Cc: Munroe, John
Subject: Please Review Journal Entry

Workflow Notification

Priority:

Date Sent: 2007-03-29

Sent To: England, Kristina D/CKENGLAN
cc:

Please click on the link below to access this transaction:
https://appsdevfin-inside.umassadmin.net/psp/fstst89/EMPLOYEE/ERP/c/PROCESS\_JOURNALS\_JOURNAL\_ENTRY\_IE.GBL?Page=JOURNAL\_ENTRY1&BUSINESS\_UNIT=UMCEN&JOURNAL\_DATE=2007-03-16&JOURNAL\_ID=0002607181&Action=U

Message Text:

Hi,

Please review the following entry before it is edited and posted. Call me with any questions at 6-1597.
  
```

The hyperlink that appears in the body of the email directs the recipient to the actual page from which you have notified them.

To access the page that was sent:

1. The Recipient will be prompted to log in (if not already).
2. The Recipient must have secure access to the page.

END JOB AID