



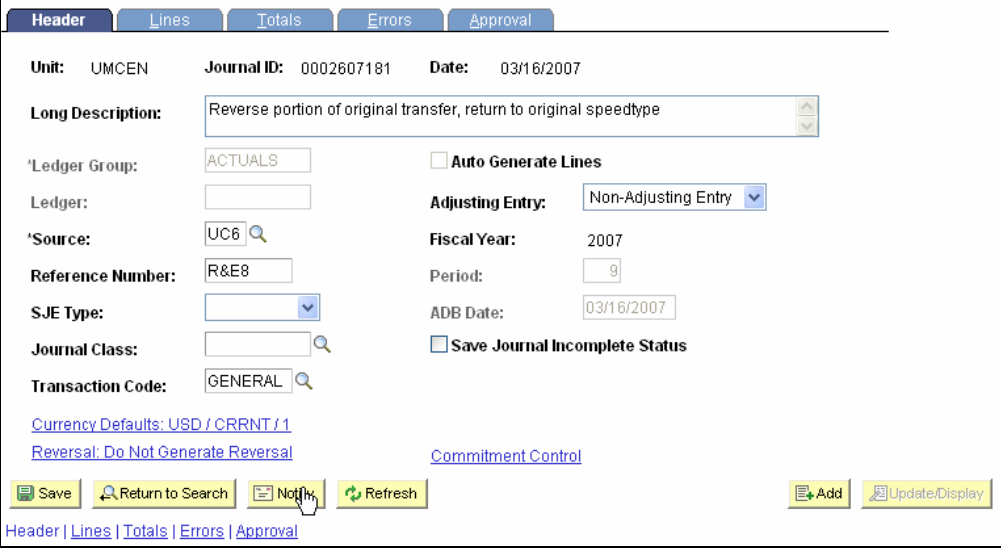

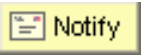


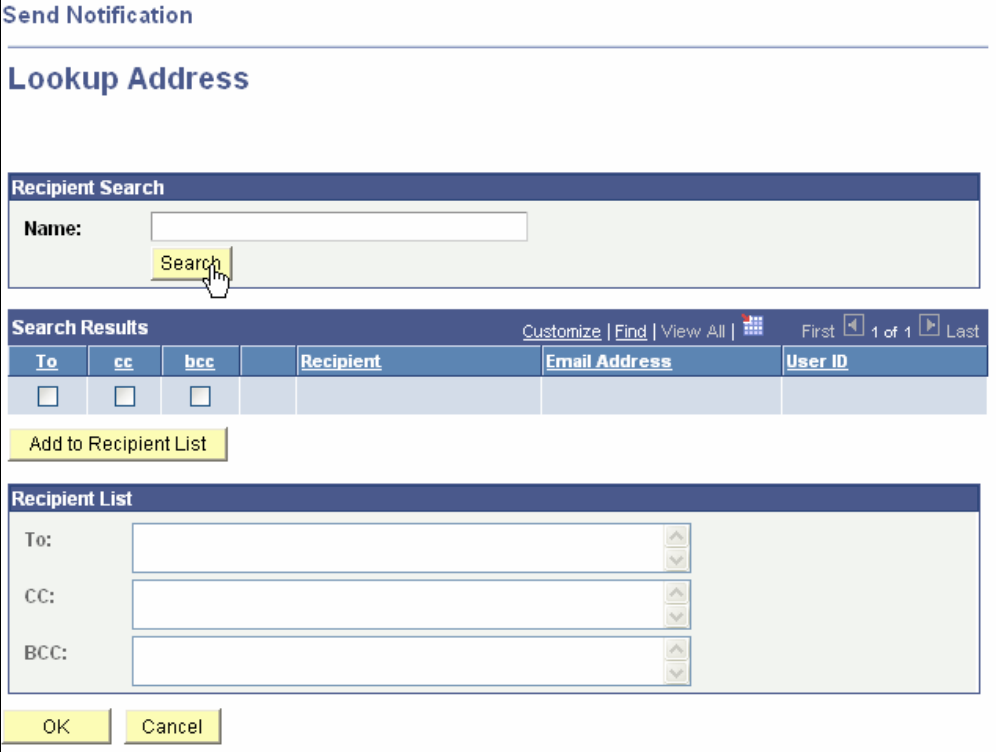

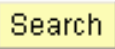
## How to Use the Notify Button


	<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><b>Step 1.</b></p>	<p><b>Log into</b> the e*mpac Finance Production 8.9 Application with your FIN Username and Password.</p>
	<p><b>Navigate</b> to the appropriate process page.</p> <p><i>In this job aid, the process page used is the <b>General Ledger Journal Entry</b> page at <b>General Ledger – Journals – Journal Entry – Create/Update Journal Entries</b>.</i></p>
	<p>The <b>Create/Update Journal Entries (Add a New Value)</b> page opens.</p> <div data-bbox="389 1008 1388 1449" style="border: 1px solid black; padding: 10px;"> <p><b>Create/Update Journal Entries</b></p> <p><a href="#">Find an Existing Value</a> <b>Add a New Value</b></p> <hr/> <p><b>Business Unit:</b> <input type="text"/> </p> <p><b>Journal ID:</b> <input type="text" value="NEXT"/></p> <p><b>Journal Date:</b> <input type="text" value="03/15/2007"/> </p> <p><b>Add</b></p> <p><a href="#">Find an Existing Value</a>   <a href="#">Add a New Value</a></p> </div>
<p><b>Step 2.</b></p>	<p>Click the <b>Find an Existing Value</b> tab.</p>


	<p>The <b>Create/Update Journal Entries (Find an Existing Value)</b> page opens.</p> <div style="border: 1px solid black; padding: 10px;"><h3>Create/Update Journal Entries</h3><p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p><p><a href="#">Find an Existing Value</a> <a href="#">Add a New Value</a></p><p><b>Business Unit:</b> = <input type="text"/> <input type="button" value="Search"/></p><p><b>Journal ID:</b> begins with <input type="text"/></p><p><b>Journal Date:</b> = <input type="text"/> <input type="button" value="Calendar"/></p><p><b>Document Sequence Number:</b> begins with <input type="text"/></p><p><b>Line Business Unit:</b> = <input type="text"/> <input type="button" value="Search"/></p><p><b>Journal Header Status:</b> = <input type="text"/> No Status - Needs to be Edited <input type="button" value="Dropdown"/></p><p><b>Budget Checking Header Status:</b> = <input type="text"/> <input type="button" value="Dropdown"/></p><p><b>Source:</b> = <input type="text"/> <input type="button" value="Search"/></p><p><input type="button" value="Search"/> <input type="button" value="Clear"/> <a href="#">Basic Search</a> <input type="button" value="Save Search Criteria"/></p><p><a href="#">Find an Existing Value</a>   <a href="#">Add a New Value</a></p></div>
<b>Step 3.</b>	<b>Enter</b> the appropriate search criteria.
<b>Step 4.</b>	<b>Click</b> the <input type="button" value="Search"/> button.

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

	<p>The <b>Send Notification</b> page opens.</p> <div data-bbox="391 407 1393 1087"><p><b>Send Notification</b></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><b>Notification Details</b> <a href="#">Lookup Recipient</a> <a href="#">Delivery Options</a></p><p>To: <input type="text"/></p><p>CC: <input type="text"/></p><p>BCC: <input type="text"/></p><p>Priority: <input type="text"/></p><p>Subject: &lt;Enter Subject here&gt;</p><p>Template Text: Workflow Notification Priority: %NotificationPriority Date Sent: 2007-03-29</p><p>Message: <input type="text"/></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><b>Step 6.</b></p>	<p>Click the <a href="#">Lookup Recipient</a> link.</p>

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

	<p>The search results appear:</p> <div data-bbox="397 409 1393 697" style="border: 1px solid black; padding: 5px;"> <p><b>Recipient Search</b></p> <p>Name: <input type="text" value="England"/> <input type="button" value="Search"/></p> <hr/> <p><b>Search Results</b> <span style="float: right;">Customize   Find   View All   First 1 of 1 Last</span></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: <b>To</b>, <b>cc</b>, and <b>bcc</b>.</p>												
<p><b>Step 9.</b></p>	<p><b>Select</b> the appropriate checkbox.</p> <div data-bbox="397 863 1393 1178" style="border: 1px solid black; padding: 5px;"> <p><b>Recipient Search</b></p> <p>Name: <input type="text" value="England"/> <input type="button" value="Search"/></p> <hr/> <p><b>Search Results</b> <span style="float: right;">Customize   Find   View All   First 1 of 1 Last</span></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><b>Step 10.</b></p>	<p>Click the <input type="button" value="Add to Recipient List"/> button.</p>												

	<p>The recipient is added to the <b>Recipient List</b> section.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Send Notification</p> <hr/> <p><b>Lookup Address</b></p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Recipient Search</b></p> <p>Name: <input type="text" value="England"/> <input type="button" value="Search"/></p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Search Results</b> <span style="float: right;">Customize   Find   View All    First 1 of 1 Last</span></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 style="text-align: center;"><input type="button" value="Add to Recipient List"/></p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Recipient List</b></p> <p>To: <input type="text" value="England, Kristina D/CKENGLAN"/></p> <p>CC: <input type="text"/></p> <p>BCC: <input type="text"/></p> <p style="text-align: center;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div> </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><b>Step 11.</b></p>	<p><b>Repeat</b> 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 <b>CC:</b> field.</p>												
<p><b>Step 12.</b></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		<a href="#">Lookup Recipient</a>	<a href="#">Delivery Options</a>
To:	England,Kristina D/CKENGLAN		
CC:	Munroe,John P/UM10008926		
BCC:			
Priority:			
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**






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**Delivery Options**

Recipient Options <span>Customize   Find   </span> <span>First  1-2 of 2  Last</span>			
	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 <span>Customize   Find   </span> <span>First  1-2 of 2  Last</span>			
	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 <b>Send Notification</b> page reopens.</p> <div data-bbox="391 407 1393 1085" style="border: 1px solid black; padding: 5px;"> <p><b>Send Notification</b></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><b>Notification Details</b> <a href="#">Lookup Recipient</a> <a href="#">Delivery Options</a></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: &lt;Enter Subject here&gt; </p> <p>Template Text: Workflow Notification</p> <p>Priority: %NotificationPriority</p> <p>Date Sent: 2007-04-11</p> <p>Message:</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/></p> </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><b>Step 16.</b></p>	<p><b>Enter</b> the <b>Priority</b>, if appropriate.</p>
<p><b>Step 17.</b></p>	<p><b>Enter</b> the <b>Subject</b> (i.e. Please Review Journal Entry).</p>
<p><b>Step 18.</b></p>	<p><b>Enter</b> the <b>Message</b> you want the recipient to receive.</p>
	<p>Do not change the <b>Template Text</b>.</p>
	<p>Please note that you can use the spell check icon  to spell check the <b>Subject</b> field and the <b>Message</b> 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
<b>Unit:</b> UMCEN	<b>Journal ID:</b> 0002607181	<b>Date:</b> 03/16/2007		
<b>Long Description:</b> Reverse portion of original transfer, return to original speedtype				
<b>Ledger Group:</b> ACTUALS	<input type="checkbox"/> <b>Auto Generate Lines</b>			
<b>Ledger:</b>	<b>Adjusting Entry:</b> Non-Adjusting Entry			
<b>Source:</b> UC6	<b>Fiscal Year:</b> 2007			
<b>Reference Number:</b> R&E8	<b>Period:</b> 9			
<b>SJE Type:</b>	<b>ADB Date:</b> 03/16/2007			
<b>Journal Class:</b>	<input type="checkbox"/> <b>Save Journal Incomplete Status</b>			
<b>Transaction Code:</b> GENERAL				
<a href="#">Currency Defaults: USD / CRRNT / 1</a>				
<a href="#">Reversal: Do Not Generate Reversal</a>			<a href="#">Commitment Control</a>	
<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"/>				
<a href="#">Header</a>   <a href="#">Lines</a>   <a href="#">Totals</a>   <a href="#">Errors</a>   <a href="#">Approval</a>				



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

```

From: jmunroe@umassp.edu
To: England, Kristina
Cc: Munroe, John
Subject: Please Review Journal Entry

Sent: Thu 3/29/2007 9:20 AM

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**