



# Notify

This guide outlines the process to notify individuals from specific PeopleSoft screens. The Notify button can be found on most screens, near the save button. An email will be sent to the recipient notifying them that you want them to review the screen. The Recipient must have access to the system and access to the module that was sent to them.

## SENDING NOTIFICATION

**Maintain Requisitions**

**Requisition**

Business Unit: STCMP      Status: Open

Requisition ID: NEXT      Budget Status: Not Chk'd

Hold From Further Processing

**Header**

\*Requester: [ ]      Requisition Defaults

\*Requisition Date: 05/26/2009      Requester Info

Origin: ONL      Online      Add Comments

\*Currency Code: USD      Dollar      Requisition Activities

Accounting Date: 05/26/2009

**Amount Summary**

Total Amount: 0.00 USD

**Add Items From**

Purchasing Kit      Catalog

Item Search      Requisition Items

**Line**

| Line | Description | Quantity | UOM | Category | Price | Amount | Status |
|------|-------------|----------|-----|----------|-------|--------|--------|
| 1    |             | 0.0000   |     |          | 0     | 0.00   | Open   |

View Printable Version      \*Go to: ...More...

Save    Notify    Refresh    Add    Update/Display

1. Select the Notify button

**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**

To: reviewer@csustan.edu      Lookup Recipient      Delivery Options

CC:

BCC:

Priority:

Subject: <Enter Subject here>

Template Text: Workflow Notification

Priority: %NotificationPriority

Date Sent: 2010-08-02

Message:

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.

OK    Cancel    Apply

2. Enter the full email address of the recipient in the To: field

OR

Click the link for Lookup Recipient



Send Notification

Lookup Address

Recipient Search

Name:

Search Results Customize | Find | View All | First 1 of 1 Last

| To                       | cc                       | bcc                      | Recipient | Email Address        | User ID     |
|--------------------------|--------------------------|--------------------------|-----------|----------------------|-------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Reviewer  | reviewer@csustan.edu | 90000007475 |

Recipient List

To:

CC:

BCC:

3. Enter the first four characters of the individual's last name in Name: field
4. Click the Search button
5. Select the To box to select the individual
6. Click the Add to Recipient List button
7. Click the OK button

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:

CC:

BCC:

Priority:

Subject:

Template Text: Workflow Notification

Priority: %NotificationPriority

Date Sent: 2010-08-02

Message:

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.

8. Choose the priority
9. Enter the Subject; Requisition
10. Type the message to the recipient
11. Click the OK button

*SAMPLE MESSAGE: Dear Reviewer, please review the requisition and forward to the next approving authority..*

**NOTE: Notification is automatic.**



RECEIVING NOTIFICATION

<Enter Subject here>

AFilson@csustan.edu

Sent: Mon 8/2/2010 1:13 PM

To: April Dunham-Filson

Workflow Notification

Priority: 2-Medium

Date Sent: 2010-08-02

Sent To: [afilson@csustan.edu](mailto:afilson@csustan.edu)

cc:

Please click on the link below to access this transaction:

[https://cmsdev4.calstate.edu/psp/FSTATST/EMPLOYEE/ERP/c/REQUISITION\\_ITEMS.REQUISITIONS.GBL?Page=REQ\\_FORM&BUSINESS\\_UNIT=STCMP&REQ\\_ID=0000000012&Action=U](https://cmsdev4.calstate.edu/psp/FSTATST/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?Page=REQ_FORM&BUSINESS_UNIT=STCMP&REQ_ID=0000000012&Action=U)

Message Text:

Please approve.

12. Click on the link in the Requisition email

**NOTE: The link will take you directly to the sign in page for PeopleSoft if you are not already logged in.**