



# 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 0000002512 Budget Status Not Chk'd  
 Requisition Name 0000002512  Hold From Further Processing

Header

\*Requester 9000000999 Requester  
 \*Requisition Date 04/07/2014 Requisition Info  
 Origin ONL Online Entry  
 \*Currency Code USD Dollar  
 Accounting Date 04/07/2014

Requisition Defaults Edit Comments  
 Requisition Activities  
 Document Status

Amount Summary  
 Total Amount 950.00 USD

Add Items From  
 Purchasing Kit Catalog  
 Item Search Requester Items

Select Lines To Display  
 Search for Lines  
 Line To Retrieve

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1		Laptop	1.0000	EA	20400	950.00000	950.00	Open

View Printable Version  
 Delete Requisition \*Go to ...More...

Save Return to Search Previous in List Next in List **Notify** Refresh Add Update/Dis

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  
 CC: Delivery Options  
 BCC:  RichText

Priority: 2-Med  
 Subject: Requisition #0000002512 - Please see Item (1) below

Template: Requisition Notification for STCMP #0000002512. Detail messages are listed below.  
 1 - This is a request to approve the Requisition

Message:

2. Enter the full email address of the recipient in the To: field  
OR  
Click the link for Lookup Recipient

\*\*NOTE: If you use the lookup recipient feature the requisition will appear in the recipient's worklist. Although worklist is not functional at this time it may be in the future.

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



**Send Notification**

Lookup Address

Recipient Search

Name:

Search Results Personalize | Find | View All | |  First  Last

To	cc	bcc	Recipient	Email Address	User ID
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reviewer1	reviewer1@csustan.edu	90000000998
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reviewer2	reviewer2@csustan.edu	90000000997

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

To:  Delivery Options

CC:

BCC:

Priority:   RichText

Subject:

Template:

1 - This is a request to approve the Requisition  
2 - This is a request to approve the Requisition

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**

From: Requester@csustan.edu Sent: Fri 4/18/2014 10:25 AM  
To: Reviewer1  
Cc:  
Subject: Requisition #0000002512 - Please see Item (1) below

Requisition Notification for STCMP #0000002512. Detail messages are listed below.

- 1 - This is a request to approve the Requisition
- 2 - This is a general inquiry
- 3 - The Requisition has been approved and ordered from vendor Dell Marketing LP

If you are not already signed in to PeopleSoft, login thru the portal link below:

<https://portal.calstate.edu/>

\*\*\*Click the below link to view the Requisition page\*\*\*

[https://cmsdev6.calstate.edu/psp/FBCFSTRN/EMPLOYEE/ERP/c/REQUISITION\\_ITEMS.REQUISITIONS.GBL?Page=PT\\_WF\\_NOTIFY&Action=U&BUSINESS\\_UNIT=STCMP&REQ\\_ID=0000002512](https://cmsdev6.calstate.edu/psp/FBCFSTRN/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL?Page=PT_WF_NOTIFY&Action=U&BUSINESS_UNIT=STCMP&REQ_ID=0000002512)

Please review and approve

12. You will need to be logged into CFS to review a requisition. If you are not already logged in click the link to sign into the portal, then login to CFS.

13. Click on the link in the Requisition email