

# 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

The screenshot shows the 'Maintain Requisitions' interface. At the bottom of the screen, there is a row of buttons including 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh'. A red arrow originates from the 'Notify' button and points towards the first instruction box on the right.

1. Select the Notify button

The screenshot shows the 'Send Notification' dialog box. The 'To' field contains the email address 'reviewer@csustan.edu'. A red arrow points from this field to the second instruction box on the right. Other fields include 'CC:', 'BCC:', 'Priority: 2-Med', and 'Subject: Requisition #0000002512 - Please see Item (1) below'. There are also buttons for 'OK', 'Cancel', and 'Apply' at the bottom.

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 work list. Although work list is not functional at this time it may be in the future.

### Send Notification

Lookup Address

Recipient Search

Name:

Search Results Personalize | Find | View All | First 1-2 of 2 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

To:

CC:

BCC:

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

2 - This is a request to review

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.**

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**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