State of Oklahoma COR109

Notifications Manual

Office of Management & Enterprise Services

OKLAHOMA

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Document History

Document Revision	Date	Description
1.0	10/01/2024	Initial Document
2.0	01/07/2024	Upgrade Update

Notifications Overview

The system sends notifications automatically as part of standard workflow routings. You can also send notifications from many classic components by using the **Notify** button. This button picks up any available notification templates for that component.

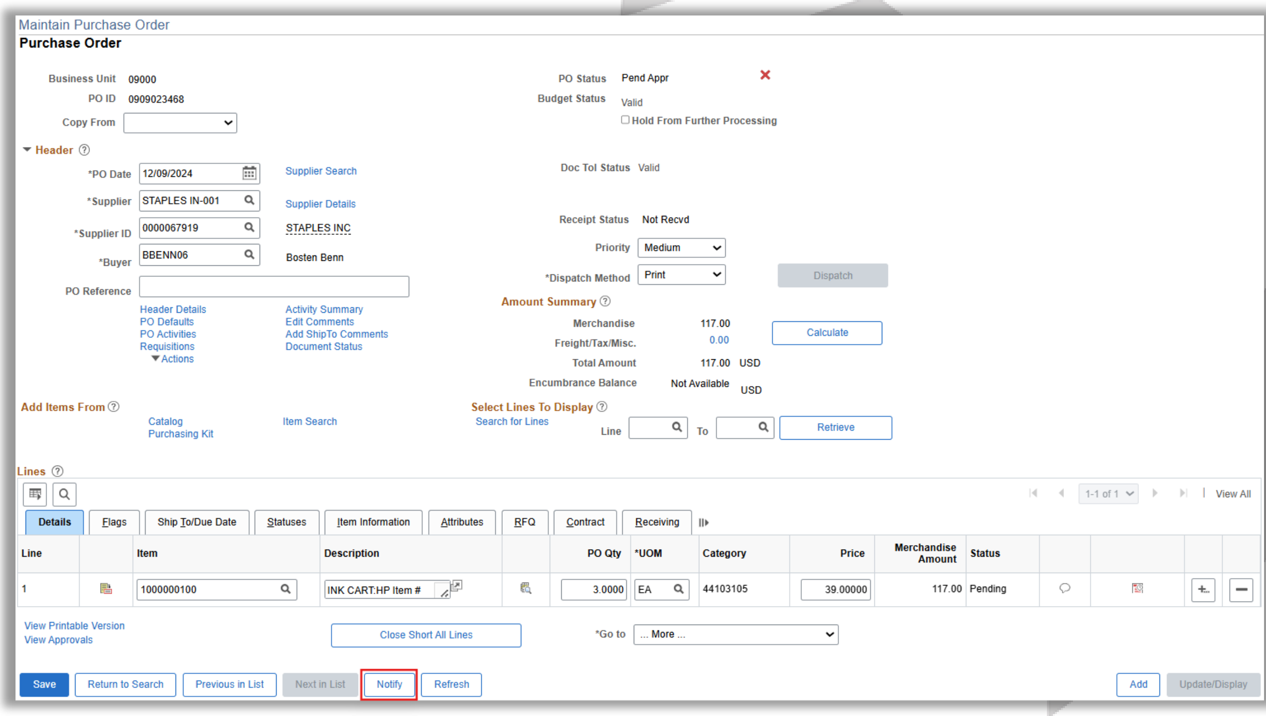
In both cases, you can send notifications by way of worklist or by email.

Access the Send Notification page by **clicking** the **Notify** button at the bottom of any classic page.

NOTE: This button is not available from Fluid components, such as Fluid Requisitions.

An example of one of the pages that include the Notify button is shown below:

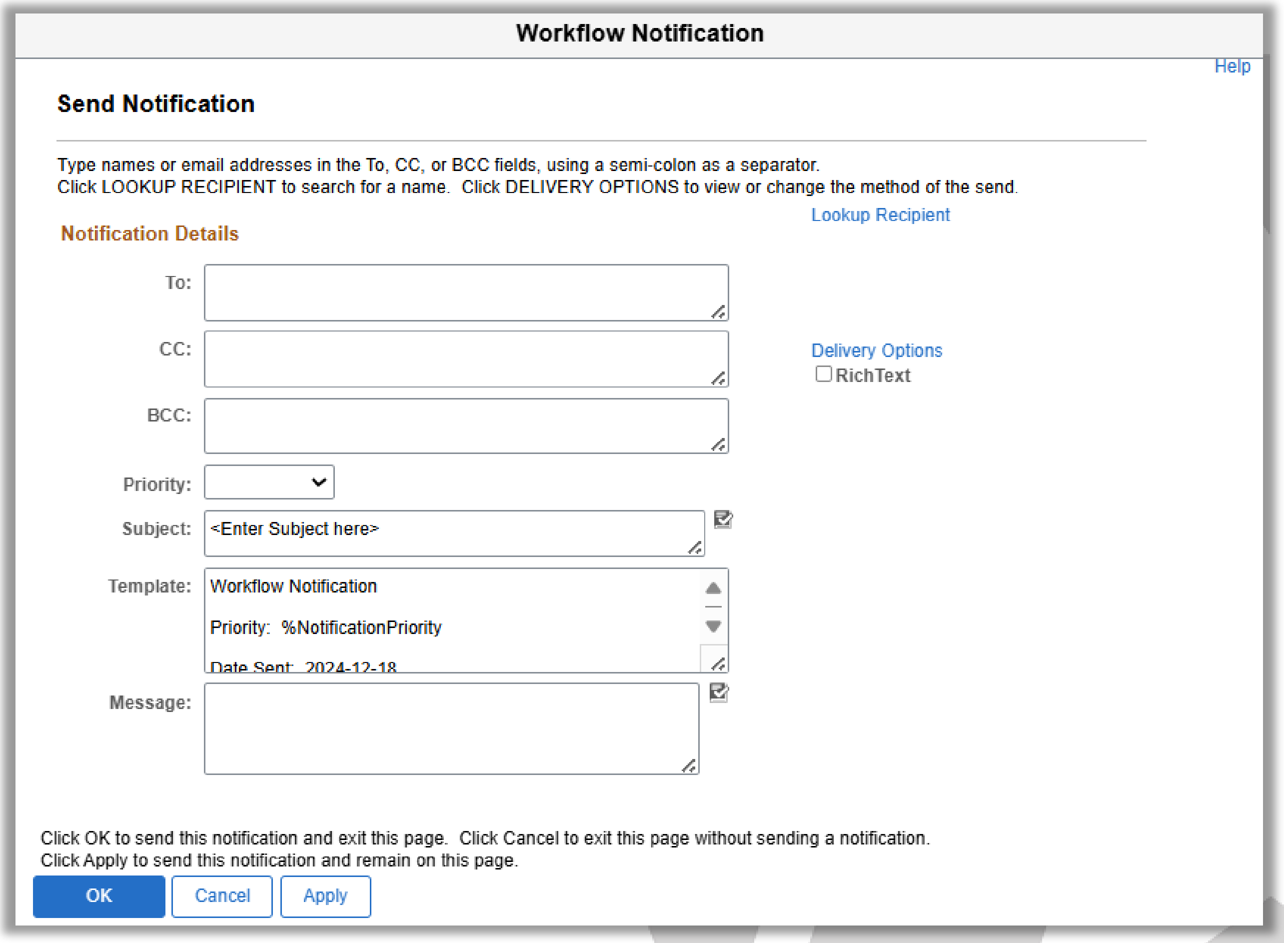
Navigation: Menu > Purchasing > Purchase Orders > Add/Update PO's > Find an Existing Value



Click the **Notify** button to access the **Workflow Notification** page.

Workflow Notification Page

The **Workflow Notification** page allows the user to define the recipient(s) of the Workflow Notification they wish to send. The fields on this page are defined below.



To - Enter the usernames (PeopleSoft User IDs) or email addresses of those who need to take action. This field can contain one or more email addresses or usernames (PeopleSoft User IDs) separated by a semicolon.

CC (carbon copy) - Enter the names or email addresses of CC recipients, who are made aware of this notification publicly.

BCC (blind carbon copy) - Enter the names or email addresses of BCC recipients, who are made aware of this notification privately.

Priority - Select a priority level for the notification: *low*, *medium*, or *high*. This priority is reflected in the notification only if the *%NotificationPriority* variable is in the template text.

Subject - Enter the topic or a brief description of the notification. The subject value may appear by default from a template, but you can edit it.

Template Text - Displays the template text, which is based on a predefined notification template. The text in this field is sent in the language of the recipient.

Message - Enter your own comments. The message text is sent in the language of the sender.

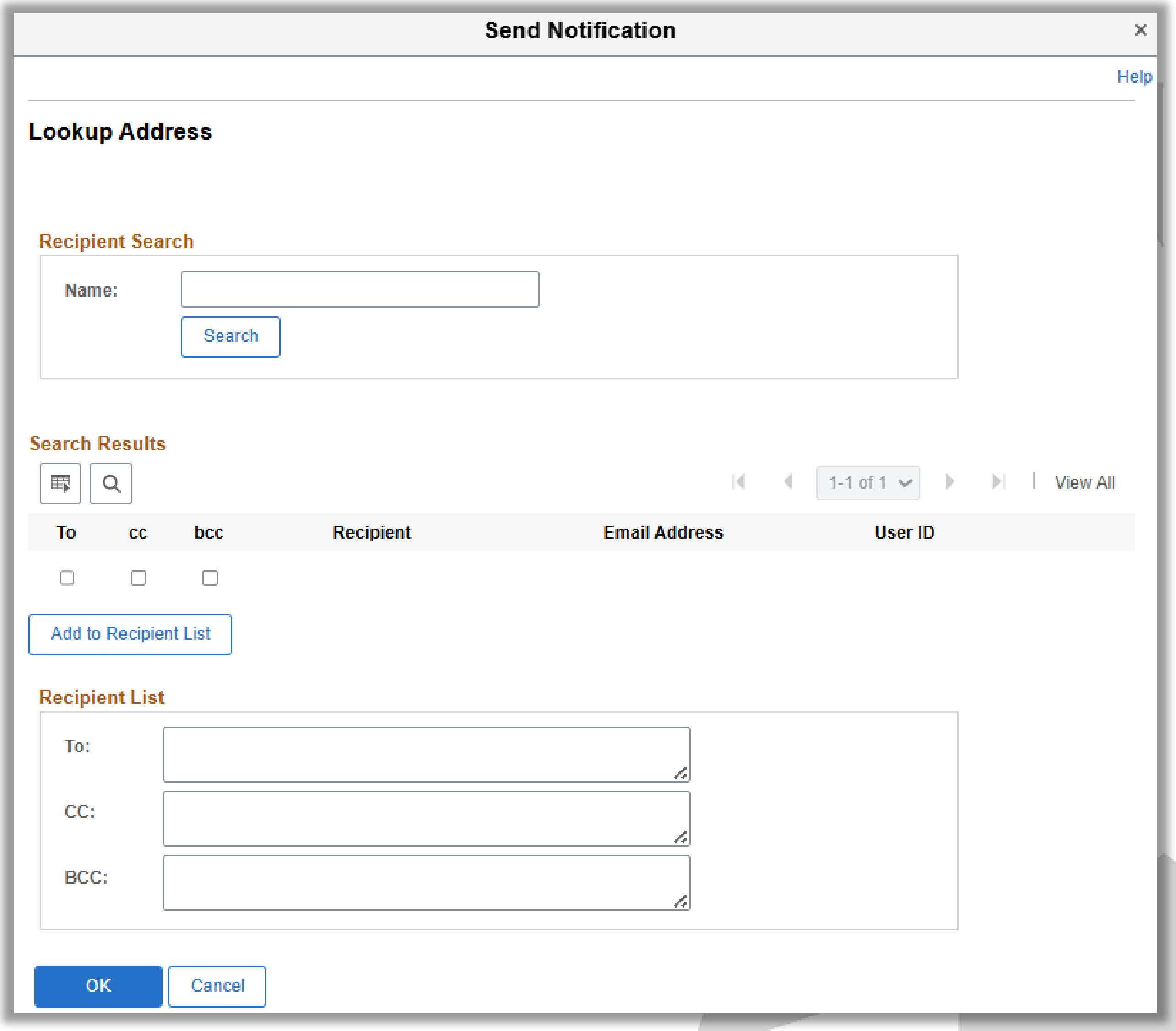
Rich Text - Select this box to enable Rich Text.

Lookup Recipient - **Click** to access the Lookup Address page. Enter the first characters of a recipient's name and **click** the **Search** button to see a list of people who match your search. To use someone as a recipient, select the check box for the type of recipient (**To, cc, bcc**) and **click** the **Add to Recipient List** button.

Delivery Options - The system populates the check boxes based on the delivery options that are defined in the recipient's user profile. The **Worklist** check box is unavailable for external email addresses.

Lookup Recipient Page

Use the **Lookup Recipient** link to search for recipients.



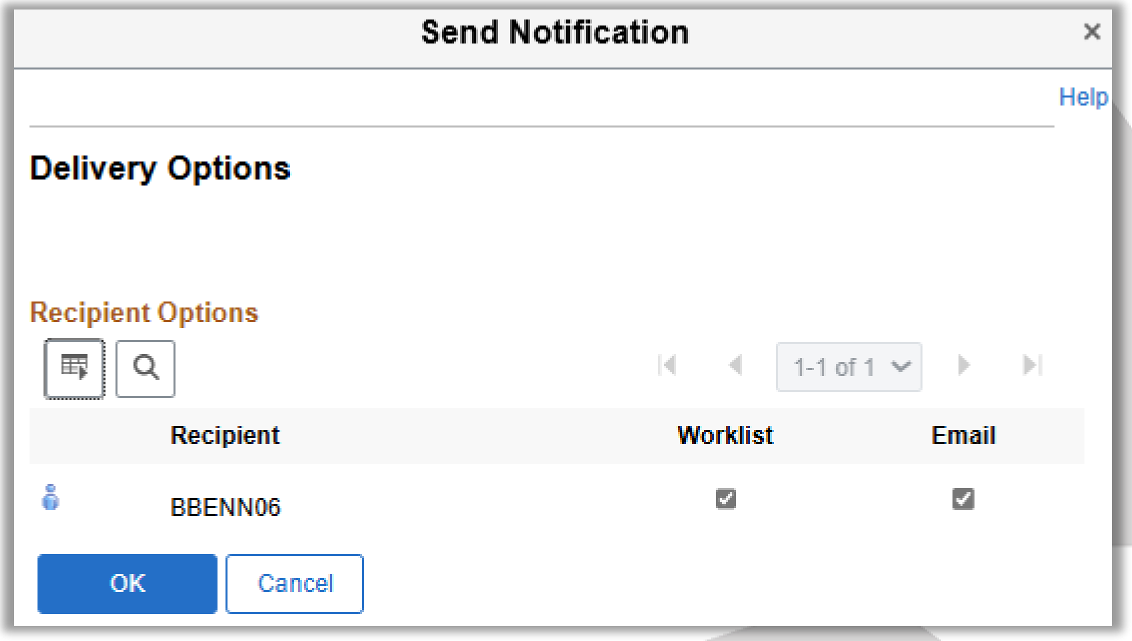
Enter the Name of the user you wish to send the notification to, then **click** the **Search** button.

The users matching the name you enter will appear in the Search Results section. **Click** the appropriate radio box to add the user as a *To*, *CC*, or *BCC* recipient.

After selecting the appropriate radio box, **click** the **Add to Recipient List** button. The user will be added to the Recipient List in the selected section.

Delivery Options

The Delivery Options page allows the user to select whether to send the Notification to the selected user's email address or their worklist.



Select the appropriate radio box, *Worklist* or *Email*, and **click** the **OK** button to apply the delivery options to the notification.

Using Worklists to Receive Ad Hoc Notifications

PeopleSoft offers two types of workflow notifications:

1. Email
2. Worklists

Working with Email Notifications

While many workflow-enabled applications use worklists to assign work, you may receive workflow notifications through email. When you receive an email notification, the notification typically includes a link to the PeopleSoft page where you will perform the necessary work. Depending on your business processes, you may need to notify a colleague or supervisor that you have completed the work.

Viewing a Worklist

When you use workflow-enabled applications, changes in your day-to-day tasks are reflected in a worklist. A worklist is an organized list of the work items awaiting your attention. Selecting items to work on from a worklist automatically returns the pages that you need, which enables you to bypass any other navigational structure and work directly from the worklist.

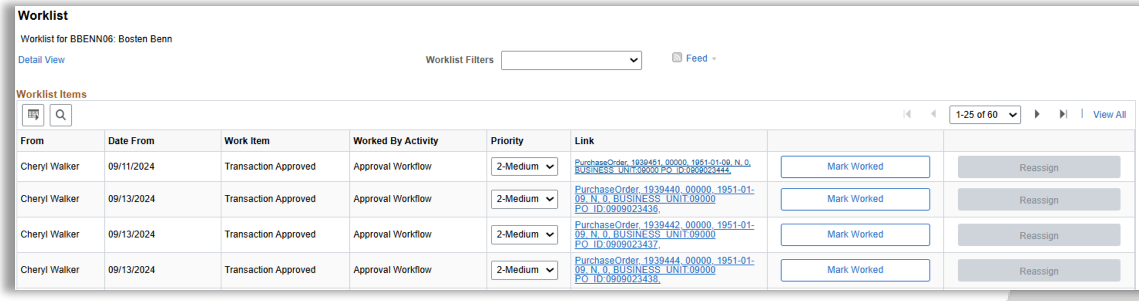
The Worklist page provides summary information about all items in your personal worklist. This page also provides links that enable you to:

- View additional details about the work.
- Perform the indicated work.
- Reassign work items.

Navigation: Menu > Worklist > My Worklist – Summary View

Worklist Summary Page

Use the Worklist page to review and process assigned worklist items. A variety of worklist items can appear. In addition to viewing/processing worklist items, on this page you can hide or rearrange columns, filter the worklist items, reassign items, and assign priority to worklist items.



Worklist Filters - Select a worklist to view, such as *Approval Routing* or *Transaction Approved*. You can only view worklists to which you are assigned. The system maintains the filter you have selected until you sign out of the PeopleSoft system.

From - Displays who triggered the work item.

Date From - Displays when the work item was triggered.

Work Item - Displays the work items, which are the types of activities that you need to carry out. You can have multiple entries all with the same work item. For example, if you approve expense reports, you may have several entries with *Expense Approval* in the **Work Item** column. Each of these entries represents a different expense report that requires your attention.

Worked By Activity - Displays the activity that needs to be worked by the worklist item.

Priority - Ranks the worklist entry by importance. Priority values include: *1 for high, 2 for medium, and 3 for low*.

Link - **Click** a link to access the target page—the page where you work the item. The target page is specific to the type of work that you are doing. For example, the link for a Purchase Order approval item accesses the page where you can review and approve Purchase Orders.

Mark Worked button - **Click** to remove an item from your worklist without accessing the target page. You should not use this option unless the item is a simple notification and no additional work is required.

Reassign button - **Click** to forward the item to another user and remove it from your list.

Refresh button - As items are added to and removed from your worklist, **click** this button to update the page with the most recent changes.

Performing Work

To work an item on its target page, **click** the link on the Worklist page for the item that you want to work. The system transfers you to the page where you can perform the required task. When you have worked the item, it automatically disappears from your worklist.

If you need to mark an item as worked manually, such as when an entry is a simple notification with no necessary follow-up, then select the **Mark Worked** button. The item disappears from your worklist.

Reassigning a Worklist

You can also reassign a worklist item to another user. Your organization can choose to prevent particular types of items from being reassigned.

Access the Worklist.

1. **Click** the **Reassign** button.

The Reassign page appears.

2. Enter the User ID of the person to whom you are reassigning the item.

Click the **Search** button if you need help finding the appropriate user ID.

3. (Optional) Enter a comment.

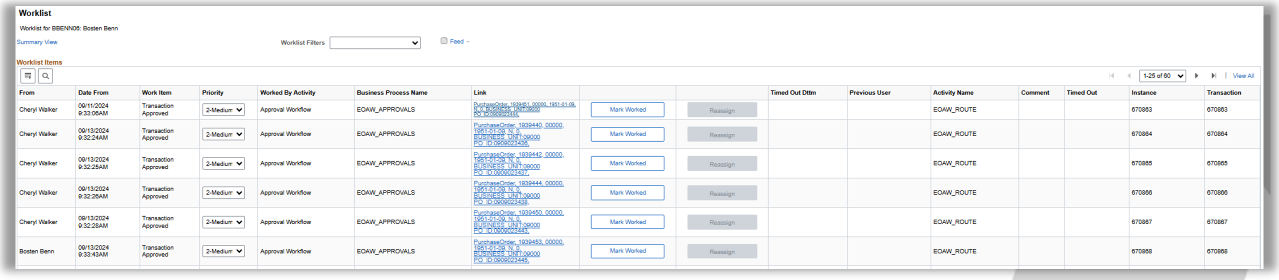
The comment becomes part of the worklist item when it appears in the assignee's worklist.

4. Click **OK.**

The user can access the Worklist Detail page by clicking the **Detail View** link from the Worklist Summary page.

Worklist Detail Page

The detail view includes supplemental information about each item, such as the date and time that you first selected the item to work on, and comments that another user entered if the item was forwarded to you.



The same fields found on the Worklist Summary page are shown on the Worklist Details page, with additional fields.

Timed Out Dttm (Date and Time) - Displays the date and time when the item will time out if it is not already worked.

Previous User - Displays the user whose action triggered this item.

Selected Dttm - Displays the date and time when you first selected this item (to work the item).

Comment - Displays the comment (if any) entered by the user if the item was forwarded from another user.

Timed Out - Indicates whether the item has timed out.

Instance - Displays a unique identifier for each item of the same type.

Transaction - Displays a unique identifier for each item in the worklist.