

# Using 'Notify' for Expense Documents

Once an expense report has been submitted, the Notify button becomes available at the bottom of the page. Notify is used to send an email notification to the person(s) that will approve the document (applicable to departments that **currently** utilize the online Expense Manager Approval feature).

1. Click on the **Notify** button at the bottom of the page.

[Expense Report](#)

## View Expense Report

**Charlene Joyce**  
**Your expense report 0000358285 has been submitted for approval.**

**Business Purpose** Training  
**Description** How to use NOTIFY button  
**Reference**

**Totals** [View Printable Version](#)

Employee Expenses (1 Line)	75.00 USD	Non-R
Cash Advances Applied	0.00 USD	

**Amount Due to Employee 75.00 USD**

By checking this box, I certify the expenses submitted are accurate and

[Submit Expense Report](#)

[Refresh Approval Status](#)

[Return to Search](#) [Notify](#)

2. On the Send Notification page, click on the **Lookup Recipient** hyperlink. The Recipient should be your departmental approver, not the Controller's office staff.

[Employee Self Service](#)

## 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:

[Lookup Recipient](#)

[Delivery Options](#)

RichText

3. In the Recipient Search section, enter the last name of the person to whom you want to send the email notification. You can enter a partial name.
4. Click the **Search** button to display a list of names.

## Send Notification

### Lookup Address

**Recipient Search**

Name:

5. Click the box under **TO** for the person to whom you want to send the email.
6. Click the **Add to Recipient List** button. That person will now appear in the Recipient List.

## 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Joyce,Charlene M	cjoyce@umassp.edu	CCJOYCE
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Joyce,Charlene M	cjoyce@umassp.edu	SUM10140942



#### Recipient List

- Repeat steps 3 through 6 for additional recipients, checking the appropriate box to indicate person should be in the To, cc or bcc section.

- Once all recipients have been added, click **OK** to return to the Send Notification page.

**Add to Recipient List**

**Recipient List**

To: Joyce,Charlene M/CCJOYCE

CC: Momtaheni,Megan M/CMMOMTAH

BCC:

OK Cancel

- Enter the **Subject**. Be sure to include as much information as possible in the Subject, including the TA or ER number.
- Enter a **Message**. Provide additional information to the recipient.
- Click **OK**.

**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: Joyce,Charlene M/CCJOYCE

CC: Momtaheni,Megan M/CMMOMTAH

BCC:

Priority:

**Subject:** Testing in LTT: ER # 358285 / Training session

Template: Workflow Notification

Priority: %NotificationPriority

Date Sent: 2018-02-22

**Message:** Good morning, Megan.

Please approve my Expense Report for the training session I attended in early February.

**Delivery Options**

RichText

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

The recipient will receive an email notification that will look like this. The email contains a link to the Approval Worklist.

-----Original Message-----

From: [cjoyce@umassp.edu](mailto:cjoyce@umassp.edu) [mailto:[cjoyce@umassp.edu](mailto:cjoyce@umassp.edu)]  
Sent: Tuesday, March 6, 2018 9:42 AM  
To: Momtaheni, Megan <[mmomtaheni@umassp.edu](mailto:mmomtaheni@umassp.edu)>  
Cc: Joyce, Charlene <[CJoyce@umassp.edu](mailto:CJoyce@umassp.edu)>  
Subject: FSLTD92: Link in TA Notify email (F92-10144)

Workflow Notification

Priority:

Date Sent: 2018-03-06

Sent To: Momtaheni, Megan M/SUM10070693

cc: Joyce, Charlene M/SUM10140942

Please click on the link below to access this transaction (You must be logged into PeopleSoft Finance Application before clicking on link):

[https://fs-ltd.erp.umasscs.net/psp/fsltd92/EMPLOYEE/ERP/c/APPROVE\\_EXPENSE\\_TRANSACTIONS.EX\\_APPRVL\\_WORKLIST.GBL?Page=EX\\_ALLTXN\\_APPR&TRAVEL\\_AUTH\\_ID=0000013153&Action=U](https://fs-ltd.erp.umasscs.net/psp/fsltd92/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS.EX_APPRVL_WORKLIST.GBL?Page=EX_ALLTXN_APPR&TRAVEL_AUTH_ID=0000013153&Action=U)

Message Text:

Hi Megan,

This is a test to confirm that the link included in this email takes you to the Approval Worklist page.

Would you let me know if the link takes you to the desired page?

Thank you!

Charlene