Workflow Notifications

One of the components of workflow in PeopleSoft/NUFinancials is the ability to send email notifying users when there is an item in their Approval Inbox. Depending upon the number of emails received, you may wish to filter the workflow notifications into folders (for instructions, see page 5).

Typical workflow notifications include emails for:
- Expense report approval
- Requisition approval
- Actuals journal approval
- Budget journal approval
- Travel authorization approval
- Cash advance notification of approval
- Cash advance send back
- Shopping Cart Assignment
- Shopping Cart Retrieval
- Approval Escalation
- Receipt Notification

Sample Workflow Notification Approval Emails

The images below display sample workflow emails seeking approvals. Each email includes basic information about the person and the item seeking approval as well as a link that will redirect you to the item for approval.

Expense Report

Expense report 0000000320 for Petersen, Matthew A requires your attention

An expense report has been submitted that requires your action:

- Employee ID: [Redacted]
- Employee Name: Petersen, Matthew A
- Submission Date: 2008-11-17
- Report Description: WITHHOLDING
- Report ID: 0000000320
- Business Purpose: Department Gatherings
- Amount: 35 USD

You can navigate directly to the approval page by clicking the link below:

http://buddy.rtss.northwestern.edu:2080/rp/strm/employee/ERF/ps/NU_WORKFLOW/NU_WF_INBOX/6BLZ/nepaU
Journal Approval

Approval is Requested for Actuals Journal ID 0000004849
m-gordon@northwestern.edu

Actuals Journal ID 0000004849 entered for 2008-11-10 requires your attention. Please visit your approval inbox to locate and review this transaction by clicking the link below.


Requisition Approval

Approval is Requested for Requisition ID REQ0001789 Line 1
mpetersen2@northwestern.edu

A requisition line has been entered which requires your attention.

Requestor: RTAYLOR
Requisition Id: REQ0001789
Requisition Name: AGRSP SUPP & SVC0 06
Line: 1
Description: MAINTENANCE FOR ALL STERILIZERS
Date: 2008-11-10

You can navigate directly to the approval page by clicking the link below.

https://nufin.northwestern.edu:6443/pasp/fm89préwew/UI/MM/ERPA/NCU_WORKFLOW/NUL_WF_INBOX/GUI?mode=U

Travel Authorization Approval

Approval requested for travel authorization Grants for Talbot, Gretchen S.
catherine.bauer@northwestern.edu

A travel authorization request has been submitted that requires your attention.

Employee Id: XXXXXXX
Employee Name: Talbot, Gretchen S.
Submission Date: 2008-11-10
Travel Auth Description: Grants
Travel Auth Id: 0000000000
Business Purpose: Recruitment/Student
Reimbursement Amount: 5000 USD

You can navigate directly to the page for more information by clicking the link below.

https://nufin.northwestern.edu:6443/pasp/fm89préwew/UI/MM/ERPA/NCU_WORKFLOW/NUL_WF_INBOX/GUI?mode=U/TSV auth_ID=0000000000&LINE_NS=1
Shopping Cart Assignment

A shopping cart has been assigned to you
consultant@northwestern.edu
To: r-henry@northwestern.edu

Shopping Cart Assignment Notification

Dear Randall T Henry

A shopping cart has been assigned to you by Cafe TestUser (pukomn@northwestern.edu). The shopping cart can be accessed for review in "Draft Carts" in iBuyNU. Please login to the NU Portal to access NUFinancials and create a requisition to access the referenced cart in iBuyNU.


If applicable, the user has submitted the following additional comments:

Please use chartstring 110 1234567 71234

If you have any questions with regard to this shopping cart, please contact the NUIT Support Center.

Support Center Contact Information:
+1 (947) 691-4357
consultant@northwestern.edu

Thank you,
Northwestern University
consultant@northwestern.edu

Shopping Cart Retrieval

From: consultant@northwestern.edu
To: r-henry@northwestern.edu
Cc: 
Subject: Your Shopping Cart Has Been Retrieved, Cart # 201122

Shopping Cart Retrieval Notification, Cart # 201122

Dear Cafe TestUser,

Your shopping cart '2008-11-18 Light bulbs' has been submitted for processing by Randall T Henry (r-henry2@northwestern.edu).

If there are any questions concerning your shopping cart, you will be contacted by your Requester.

If you have any questions with regard to this notification, please contact the NUIT Support Center.

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Thank You,
+1 (947) 491-4357
consultant@northwestern.edu

Northwestern University
Receipt Notification

S: CARMELLA@NORTHWESTERN.EDU

Purchase Order No. PUR0010079, which was issued following the initiation of Requisition No. REQ001398 has been vouched in NU Financials by Accounts Payable but has not yet been received by your Department/School. If the products ordered have been delivered or the services ordered have been provided, click on the link below to do a Receipt in NU Financials. This is the last step in the procurement process and is your way of authorizing payment to the vendor.

Click the following link to receive the Purchase Order:


Approval Escalation

[Image of an email message with the following content:

From: Matthew Petersen
Subject: Requisition REQ0001053 has Timed Out
Date: October 9, 2008 11:42:35 AM CDT
To: Matthew Petersen

Requisition REQ0001053 that you entered on 2008-09-15 [accounting date] has not yet been approved for payment. Please follow-up with the manager in your approval chain in order to ensure the document is processed or inactivated prior to the end of the accounting period.

How to Configure a Rule in Microsoft Outlook to Filter Notifications

Based on the volume of workflow notifications, you may wish to manage them by creating folders and rules in Outlook. There are several methods for doing this, however this job aid will only detail one method – Create a rule based on a name or subject.

For assistance configuring Outlook or another email client, contact the Help desk at 1-HELP (847-491-4357) or consultant@northwestern.edu.

• You will need to create a rule for each type of workflow notification you will receive.
• Rules created for workflow should not include the requisition id, expense report number, etc. as part of the filtering criteria.
• Rules should be more generic than specific to increase the number of emails filtered.

1. Open the message that the rule will be based on.

2. On the toolbar, click Create Rule icon (red box).

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3. In the **Create Rule** dialog box opens.

![Create Rule dialog box](image)

4. Modify the **When I get e-mail with all of the selected conditions** and the **Do the following** as needed. Check the **Move e-mail to folder**. A new window will open giving the option of either selecting an existing folder or creating a new folder. In this case, create a new folder by clicking the **New...** button.

![Rules and Alerts dialog box](image)
5. The **Create New Folder** box opens. Type in the name of the folder where the incoming message(s) should be redirected. In this case, the folder name will be **Approvals - Req**. 

*Note:* This folder name was chosen so all the Approval folders are kept together and easily scanned at a glance. For example, create other folders called: Approvals – Exp, Approvals – Travel Auth.
6. Click the ‘+’ by Personal Folders. This expands the list of Personal Folders. Select a folder to create the new folder. In this case, Personal Folders is selected. Click the OK button.

7. The new folder, Approvals – Req is created. Ensure the folder Approvals – Req is selected and click OK.
8. The rule is now complete. Click **OK** to save.

![Create Rule Image]

9. You will see a message indicating the rule has been created. Check the **Run this rule now on messages already in the current folder**. Click **OK**.

![Success Image]

10. The rule will execute and any email fitting the rule criteria will be moved from the inbox to the new folder Approvals – Req. It will be applied to any new emails received in the inbox.

![Microsoft Office Outlook Image]

Rule creation is complete. Repeat this process for each of the types of workflow notifications you receive.