

How to send a Journal or Voucher to another person via email while in PeopleSoft Financials, as a “courtesy copy” and/or correction that is needed for that particular Journal or Voucher by the creator.

Access the Financial Production database: <https://my.uh.edu/fs>

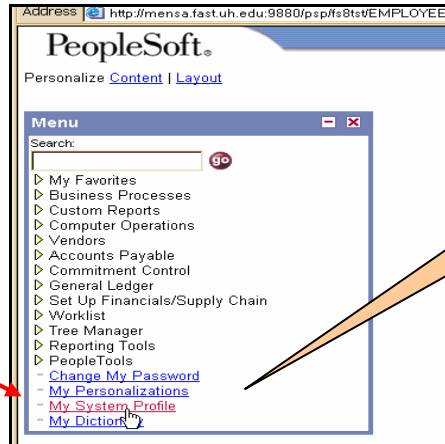
Or, See the [SignOn Financial Production](#) job aid.

Remember to use ALL CAPS

Please make sure that you are set up for the workflow process for your user id. If not, please do the following:

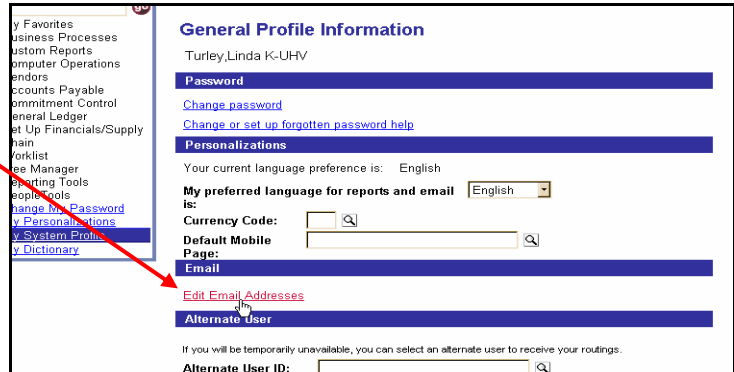
Under **Menu** click on:  
 ► **My System Profile**

If already done, then, skip to page 2, Step 1.



This is a one-time process.

Under **Email** click on **Edit Email Addresses**

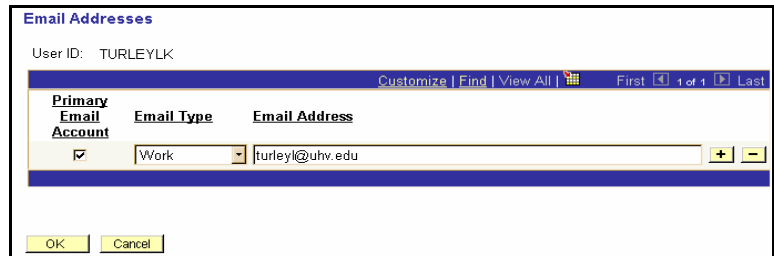


>Check **Primary Email Account**

>**Email Type** = Work

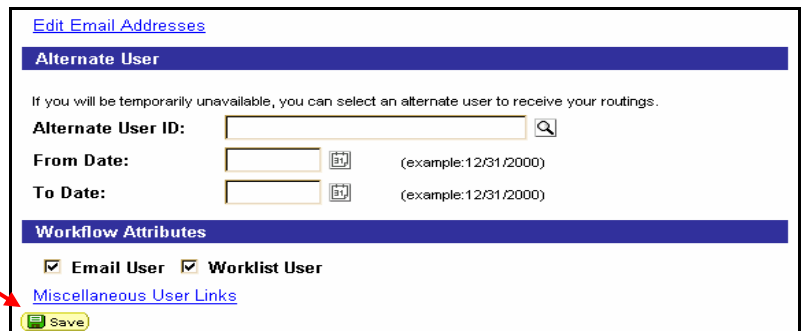
>Enter your email address

>Click **OK**



Under **Workflow Attributes**, check **Email User**  
**Worklist User**

>Click **Save**




## INSTRUCTIONS

**For a Journal:**

**STEP 1: Select Find an Existing Value tab:**

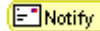
> **Either** from the existing journal panel you are currently in OR find the journal you wish to send to a recipient via email while in PeopleSoft Financial. (This should be done while in the **Header** tab or **Lines** tab of the journal.)

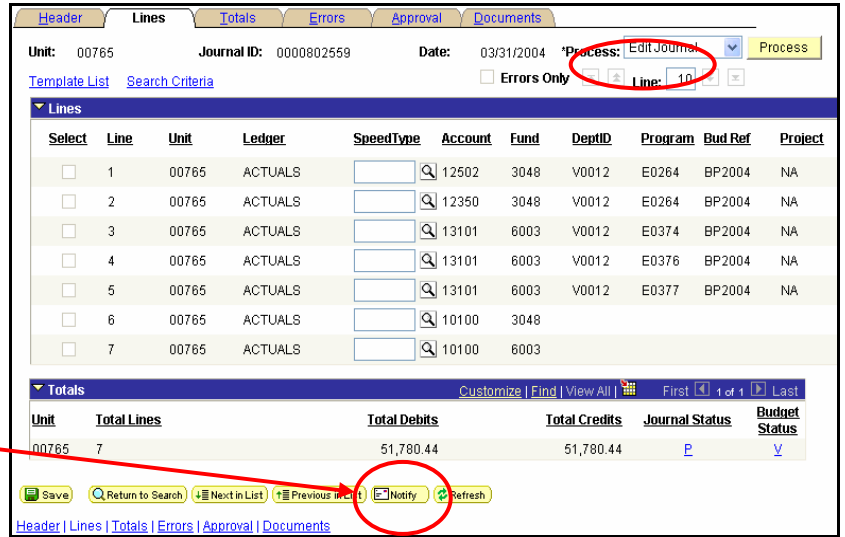
> **Click** on the  .

**OR**

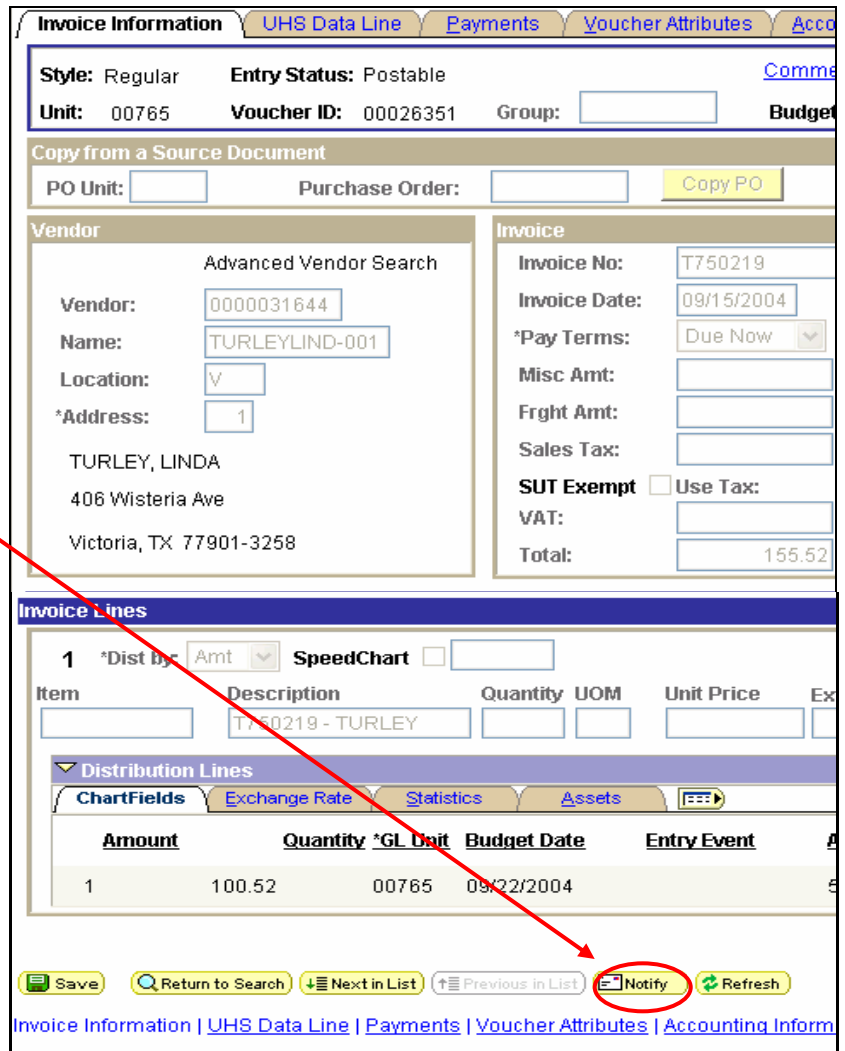
**For a Voucher:**

> **Either** from the existing voucher panel you are currently in OR find the voucher you wish to send to a recipient via email while in PeopleSoft Financial. (This should be done while in the **Invoice Information** tab of the voucher.)

> **Click** on the  .



The screenshot shows the 'Journal' interface with the 'Lines' tab selected. At the top, there are tabs for 'Header', 'Lines', 'Totals', 'Errors', 'Approval', and 'Documents'. The 'Process' dropdown menu is set to 'Edit Journal' and is circled in red. Below the tabs, there is a table of journal lines with columns: Select, Line, Unit, Ledger, SpeedType, Account, Fund, DeptID, Program, Bud Ref, and Project. The 'Totals' section shows a total of 7 lines with a total debit of 51,780.44 and a total credit of 51,780.44. At the bottom, there is a row of buttons: Save, Return to Search, Next in List, Previous in List, **Notify** (circled in red), and Refresh.



The screenshot shows the 'Invoice Information' interface with the 'UHS Data Line' tab selected. It displays fields for 'Style: Regular', 'Entry Status: Postable', 'Unit: 00765', and 'Voucher ID: 00026351'. Below this, there are sections for 'Copy from a Source Document' (PO Unit, Purchase Order, Copy PO), 'Vendor' (Advanced Vendor Search with fields for Vendor, Name, Location, Address), and 'Invoice' (Invoice No, Invoice Date, Pay Terms, Misc Amt, Frght Amt, Sales Tax, SUT Exempt, Use Tax, VAT, Total). At the bottom, there is a table for 'Invoice Lines' with columns: Item, Description, Quantity, UOM, Unit Price, and Ex. Below the table, there is a 'Distribution Lines' section with columns: Amount, Quantity, \*GL Unit, Budget Date, and Entry Event. At the bottom, there is a row of buttons: Save, Return to Search, Next in List, Previous in List, **Notify** (circled in red), and Refresh.

Under Send Notification panel:

**STEP 2:**

>Either **type** in name or **click** the [Lookup Recipient](#) link to select to whom the notification will be sent to.

>**Name:** Enter the last name of the recipient, then, click  under Name: in the Recipient Search section.

>Under **Search Results**, **check** the appropriate send response, ie., *TO*, *CC*, *BCC* for each recipient.

>**Click**  and your selections will go in the appropriate option in the Recipient List section.

*If you need to send the notification to another recipient or even cc or bcc another recipient then go back and enter the new name per the above instructions.*

>Click

**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.

[Lookup Recipient](#) [Delivery Options](#)

**Notification Details**

To:

CC:

BCC:

Priority:

Subject: <Enter Subject here>

Template Text: Workflow Notification

Priority: %NotificationPriority

Date Sent: 2004-10-27

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.

**Send Notification**

**Lookup Address**

Recipient Search

Name:

Search Results

To	cc	bcc	Recipient	Email Address	User ID
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Caylor, Kathleen	CAYLORK@UHV.EDU	CAYLORKM

Recipient List

To:

CC:

BCC:

Under Send Notification panel:

**STEP 3:**

>Click on the [Delivery Options](#) link.  
(Verify that Worklist and Email are both checked.)

>Click

**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](#) [Delivery Options](#)

To: Turley,Linda K./TURLEYLK

CC:

BCC:

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**Send Notification**

**Delivery Options**

**Recipient Options** [Customize](#) | [Find](#) | [First](#) | 1 of 1 | [Last](#)

Recipient	Worklist	Email
Turley,Linda K./TURLEYLK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Under Send Notification panel:

**STEP 4:** Now complete the Subject and Message.

>Click

**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](#) [Delivery Options](#)

To: Turley,Linda K./TURLEYLK

CC: Caylor,Kathleen/CAYLORKM

BCC:

Priority:

Subject: <Enter Subject here>

**Template Text:** Workflow Notification  
Priority: %NotificationPriority  
Date Sent: 2004-10-27

**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.