PeopleSoft Financials – "Notify" Process for Journals and Vouchers

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.*

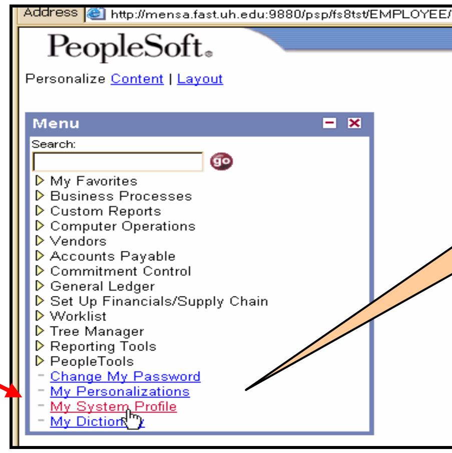
Remember to use ALL CAPS

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:

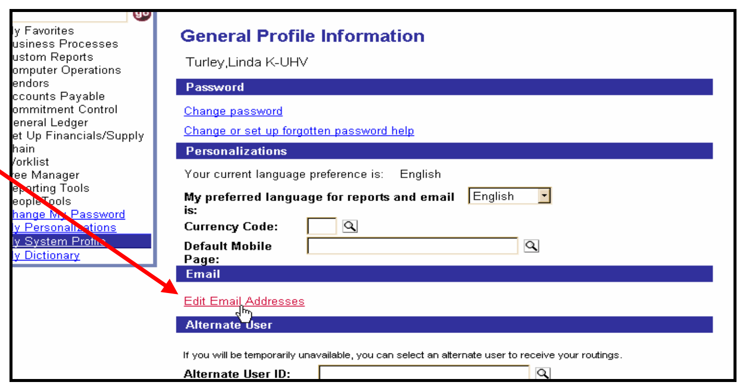
- ***My System Profile***

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



This is a one-time process.

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

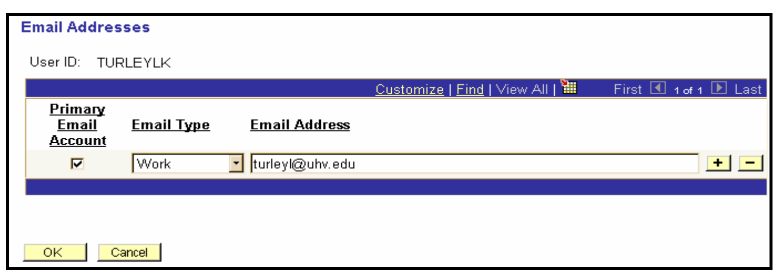


>Check **Primary Email Account**

>**Email Type** = Work

>Enter your email address

>Click OK

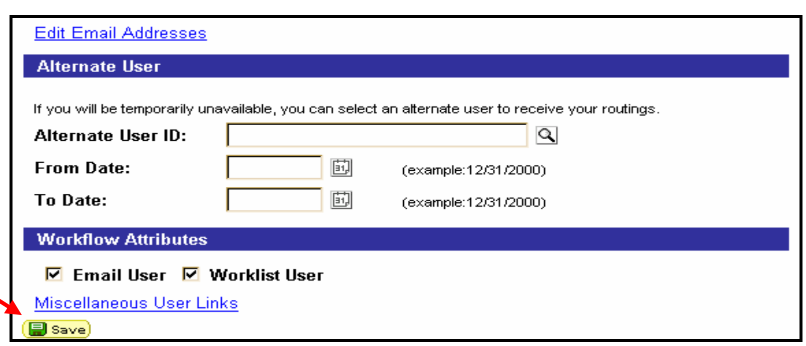


Under ***Workflow Attributes,*** check

Email User

Worklist User

>Click Save



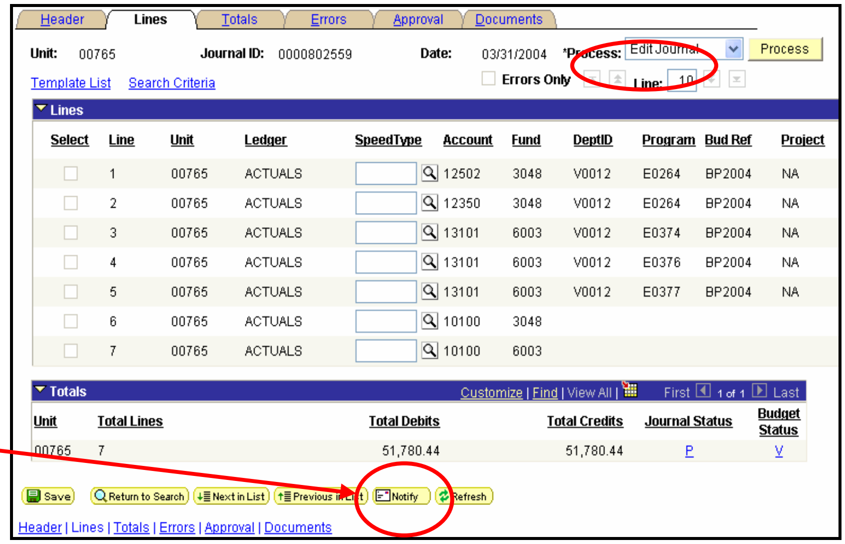
INSTRUCTIONS

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 Notify.

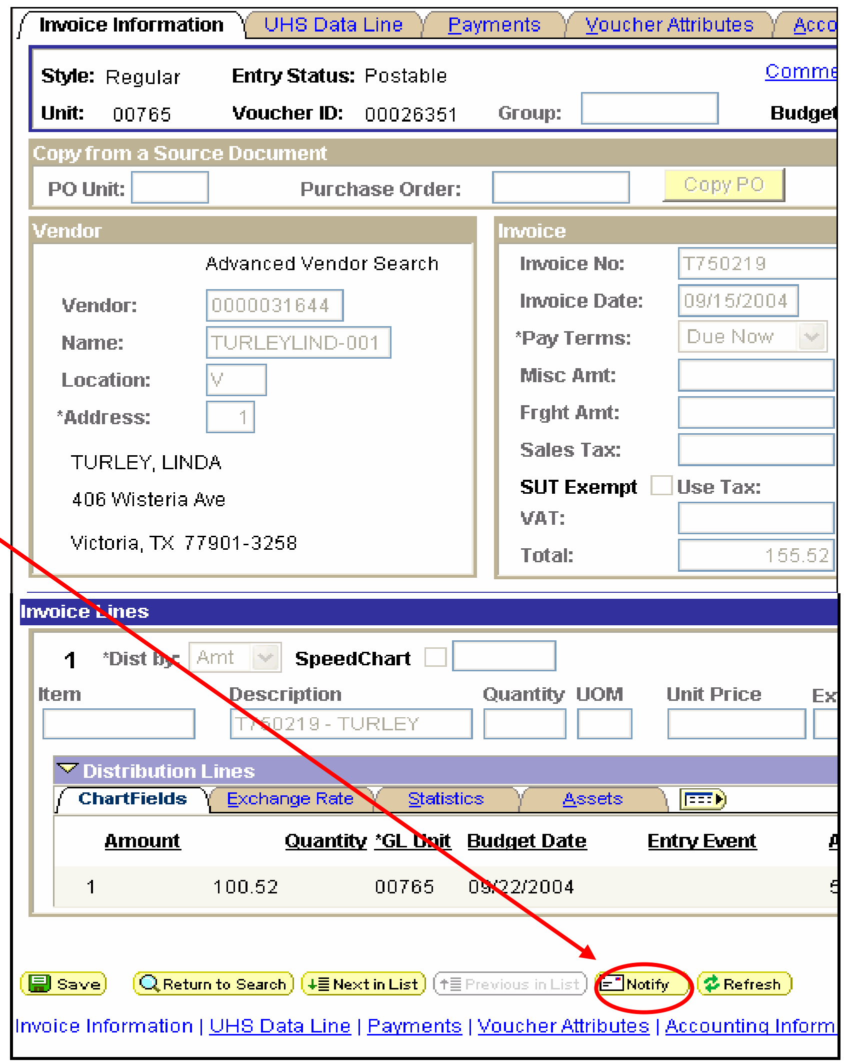


OR

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.)*

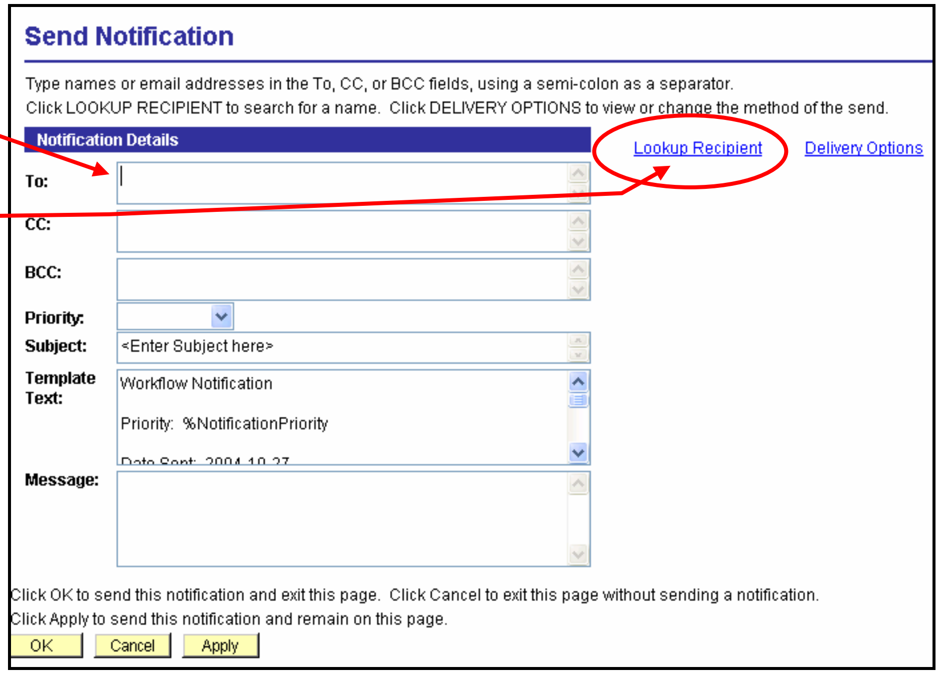
> **Click** on the Notify.



Under Send Notification panel:

STEP 2:

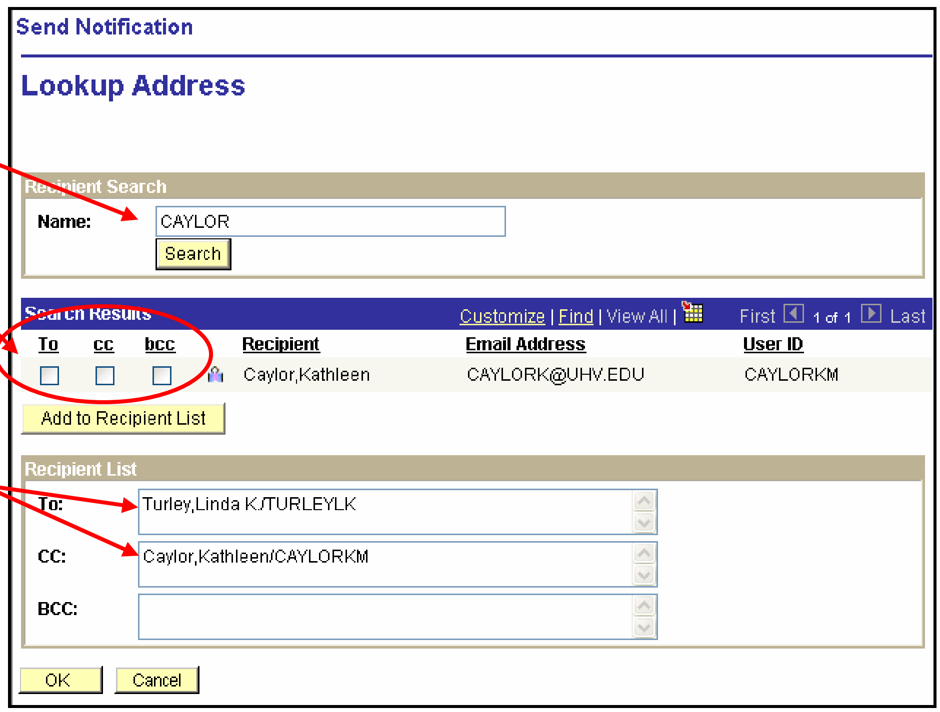
>**Either type** in name **or click** the Lookup Recipient link to select to whom the notification will be sent to.



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

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

>**Click** Add to Recipient List 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.

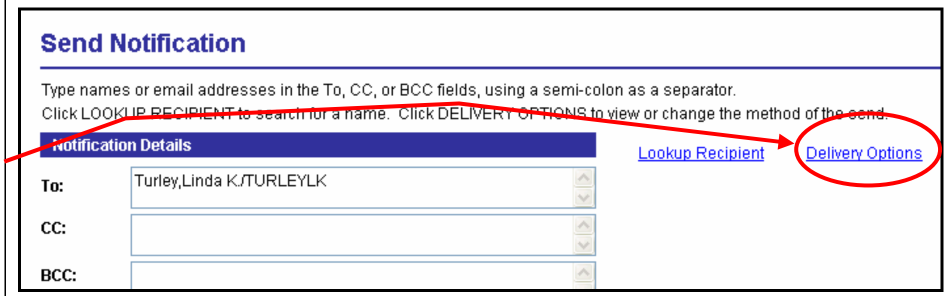
>**Click** OK

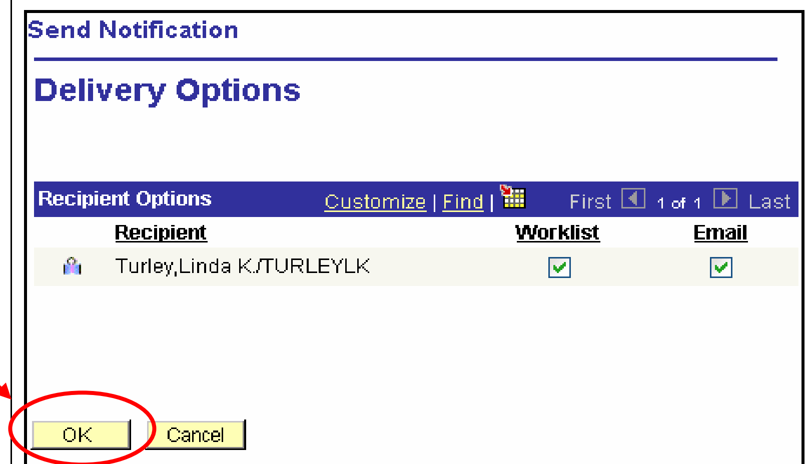
Under Send Notification panel:

STEP 3:

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

>**Click** OK.





Under Send Notification panel:

STEP 4: Now complete the Subject and Message.

>**Click** OK.