

Notifications

Last Modified on 08/31/2022 12:21 pm EDT

Approval Notifications:

When Approval Type settings indicate email notifications are to be used, users may receive notifications for the following purposes:

User Notification Type	Purpose	Purchase Order	AP Invoice	Payment Batch	Journal Entry
Assigned to Reviewer	An entry has been assigned to them for review	X	X	X	X
Waiting for Approval	An entry has been submitted that requires their approval	X	X	X	X
Moved to next Approver	An entry awaiting their approval has been approved on their behalf by an Administrator	X	X	X	X
GL Accounts Changed	An entry they have approved, or will be required to approve, has had its GL accounts changed by an Administrator	-	X	-	-
Approved	An entry they submitted has been fully approved	X	X	X	X
Disapproved	An entry they submitted has been disapproved	X	X	X	X
Posted	An entry has been fully approved and is ready to be posted	X	X	X	X
Deleted	An entry they submitted has been deleted	X	X	X	X
Paid	An invoice they submitted, or an invoice associated with a Purchase Order they submitted, has been paid	X	X	-	-
Modified After Final Approval	A fully approved Purchase Order they submitted has been modified	X	-	-	-
Manually Closed	A Purchase Order they submitted has been manually closed	X	-	-	-

In addition to the above notifications Administrators may also receive the following:

Admin Notification Type	Purpose	Purchase Order	AP Invoice	Payment Batch	Journal Entry
Auto-Approved	An entry was submitted with no required approvers and was auto-approved	X	X	X	X
Approver Out of Office	An entry is awaiting final approval by a user who is currently out of office or inactive	X	X	X	X

Notifications that require action on the user’s part will contain information about the entry, action buttons (approve, disapprove, etc.), the entry’s approval log detail, and a hyperlink to their “Pending Approvals” list.

VIEW/EDIT
APPROVE
DISAPPROVE
DISAPPROVE & RESUBMIT

Approval Log:

Message
Submitted by SGA at 8/22/2022 1:33 PM

[Show me all of my entries pending approval](#)

Office Status - Remove/Replace Approver:

Within User Preferences a user may change their Office Status to “Out” when away from the office for an extended period. Upon changing this status, if the user has entries awaiting their approval or entries for which their approval will eventually be required, they will be presented with the “Remove/Replace User” menu.

Using this menu they may:

- All Entries

Remove/Replace user for:

All Entries

Remove user

Replace user

User to replace with:

- Remove user: remove themselves from all active entry workflows
- Replace user: replace themselves with a user in all active entry workflows

- Selected Entries

Selected Entries

Entries to replace/remove in:

Edit Entry Copy Action and User Select / deselect

Type	Reference	Action	User
<input checked="" type="checkbox"/> Purchase Order	13618		
<input checked="" type="checkbox"/> Invoice	31530		
<input checked="" type="checkbox"/> Invoice	31532		

- Indicate an action, remove or replace with another specified user, for selected entries * (Unchecked entries' approval workflows will remain unmodified)

Summary vs Detail:

Within User Preferences a user may indicate if they want approval notifications to be sent to them in summary or detail:

Notifications

Approval notification type:

OR

- Summary notifications are received nightly with all entries from the preceding day
- Detail notifications are received for each entry when issued by the system

Summary notifications list information for entries the user has submitted broken down by category (fully approved, disapproved, etc.) and/or hyperlinks to entries requiring action by the user. A hyperlink to the Pending Approvals list is also provided:

You have entries pending your approval. To view the entries use the links below:

[Invoice Test Summary 123 - Vendor ID 3 - GEORGE'S](#)
[PO 8 - Vendor ID 2129 - STAPLES ADVANTAGE-DO NOT USE](#)

To view all of your entries pending approval use the links below:

[Pending Approvals List](#)

The following notifications will always be sent in detail:

- All Users
 - An entry they submitted was deleted
 - An entry they submitted or for which they are an approver has had its GL accounts modified (AP invoices)
 - An entry awaiting their approval is approaching its approval due date (reminders)
 - An entry awaiting their approval is past due (warnings)
- Admin Users
 - The last approver for an entry is currently out of office
 - An entry was auto-approved without being viewed by any users