USER GUIDE
Campus Process
ShopUW+: Notifications

ShopUW+ Notifications

As an approver, you will be receiving email notifications to let you know that you have Requests with approvals needed. University of Wisconsin Parkside have primary and backup approvers at each of the three Approval steps. Both the Primary and the Backup receives notifications.

ShopUW+ does not differentiate between the primary and backup. There is no way to stop notifications on those approval steps where you are only the backup. However, you can route those notifications so they no longer clog up your email and the primary approvers are reviewing and approving appropriately. This is especially important at the Approver 1 level.

ShopUW+ Approver Levels

All notification emails from ShopUW+ are from support@sciquest.com . The email will go to each approver separately, so you do not know who else received that notification. In the body of the email, there are some clues about what level this approval is currently sitting.

From: support@sciquest.com <support@sciquest.com>
Sent: Tuesday, April 20, 2021 11:31 AM
To: Otu, Emmanuel O <otu@uwp.edu>
Subject: New Pending Approval for Requisition# 143118533

UNIVERSITY OF WISCONSIN PARKSIDE

Department: 856400_PKS (Biological Sciences): (All Values)
Approval Request for Requisition# 143118533

Dear EMMANUEL O OTU,

The requisition listed below has been submitted for your approval.
Summary

Folder: Department: 856400_PKS (Biological Sciences): (All Values)

The Banner has the information you need:

Department: 856400_PKS (Biological Sciences): (All Values)
Approval Request for Requisition# 143118533

This is a Level 1 approver because it is **Department:.** A level 2 approver request is **Department2:** and level 3 is **Department3:.**

Knowing this is the case, you can create some email rules to manage what notifications are in your inbox and what are filtered to other folders.

In the header of your Outlook, you should see the Rules icon.
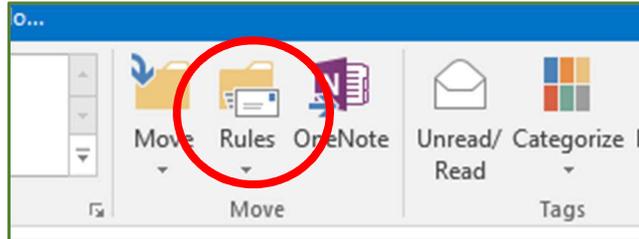
Click on the Rules icon. You want to Create Rule… click on that line.
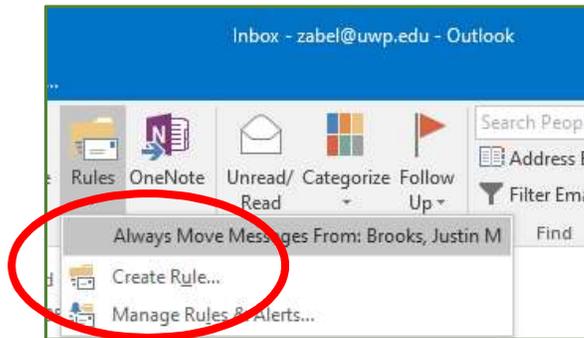
Now a pop up opens. It will pre-fill based on the email you are currently in, but you can update it as you like. In this instance, it is best to use the advanced Options. Click on that button.
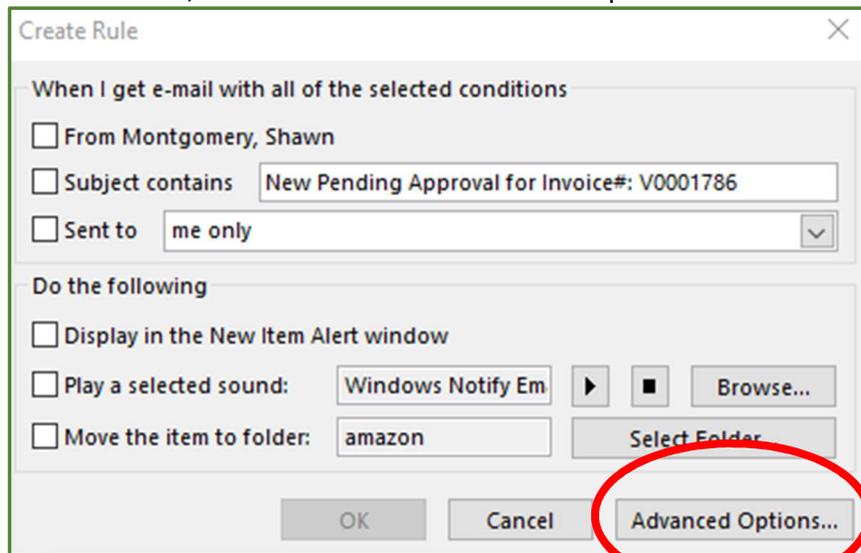
When the Rules Wizard open, you have many choices. In this instance, you want to set up your rule to meet the first condition with specific words in the body. All of these emails have the

same from and the same subject line. It is only in the body of the email that you can differentiate between the Approver levels. After you check that box, the line appears in the rule description box. Click on the hyperlink for Specific Words.
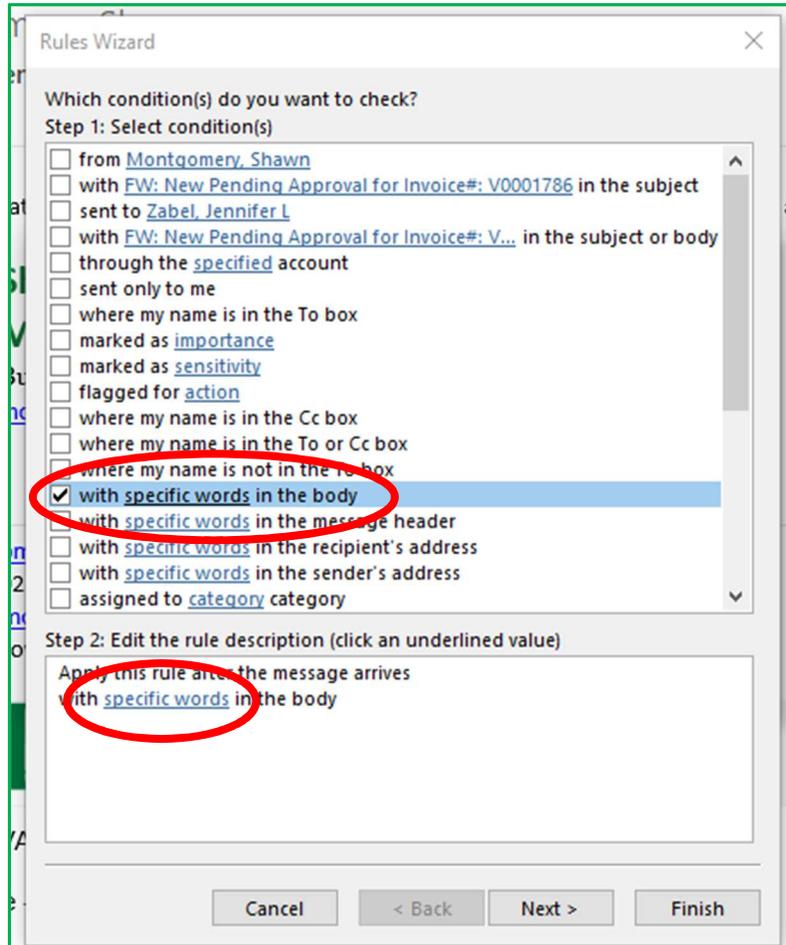
This will open another popup. In this pop-up, you enter the specific words from the body of the email that differentiate the ones you want to move to a folder.

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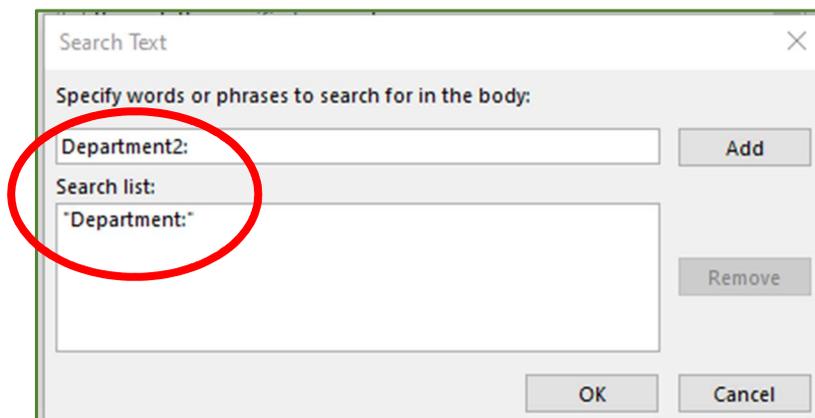
As mentioned previously, the only differences in the various emails are the Department.
If you are a level 1 Approver backup, you can move all emails with Department: into a new folder so that you will not see them.

If you are a Level 2 Backup approver, you can use Department2: as the specific words. Keep in mind that you can add as many phrases as you like but all of these will be moved to the same folder. If you want to create Level 1 and level 2 emails in different folders, then you will need to create 2 rules. When you have all of the specific words identified, then hit the Next button.

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with 'Department:' or 'Department2:' in the body

Cancel   < Back   **Next >**   Finish
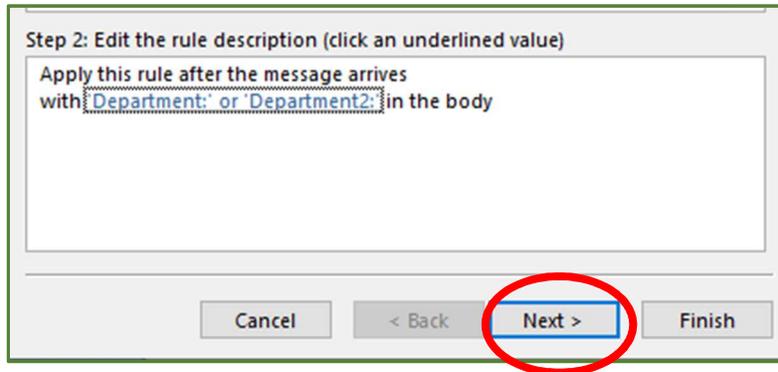
Now you select what you want to happen with these messages. I like to move messages like this to a specified folder. You could delete it automatically. What you do next depends on how you manage your email.

What do you want to do with the message?
Step 1: Select action(s)

☐ move it to the specified folder
☐ assign it to the category category
☐ delete it
☐ permanently delete it
☐ move a copy to the specified folder
☐ forward it to people or public group
☐ forward it to people or public group as an attachment
☐ redirect it to people or public group
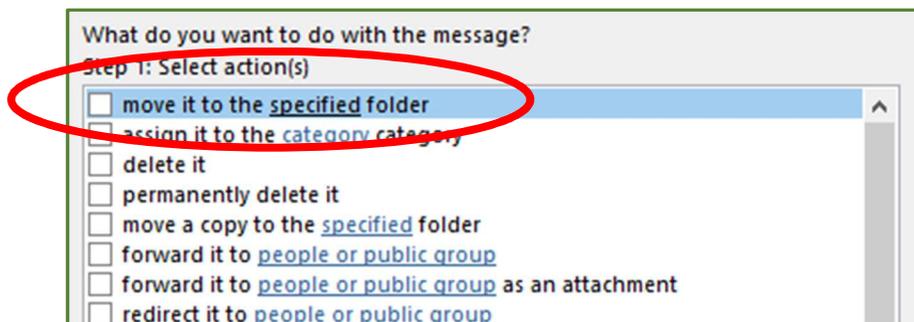
As I mentioned, I move these types of emails to a specified folder. When you check the box, the information is added to step two. Now click on the Specified hyperlink.
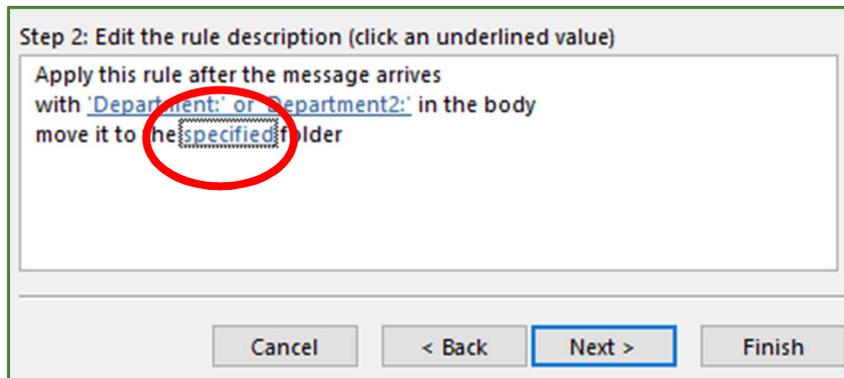
Your email folders will open. If you have not created a folder for these emails, you can click on NEW. In this case, you can see Inbox is highlighted; creating a NEW folder will place it directly in my inbox.
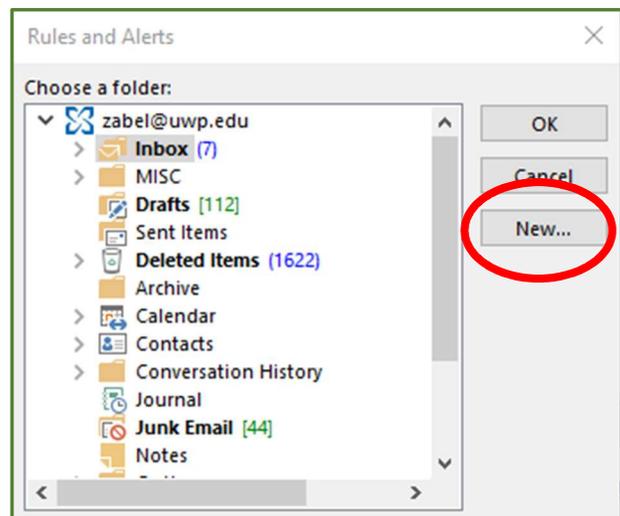
Name your folder. You can move it if you like. Hit Ok.
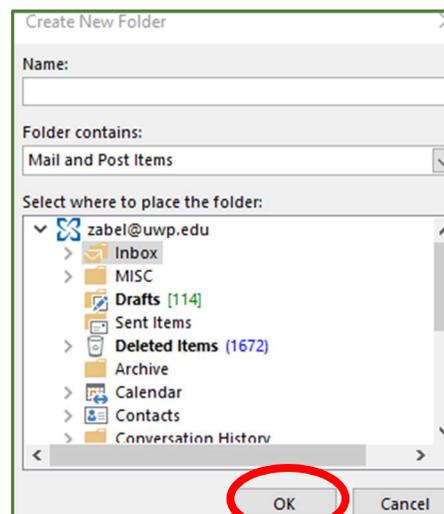
Now you can see the new folder. Hit Ok.
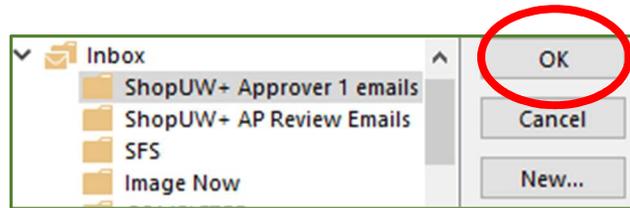
Step 2 now looks like this:
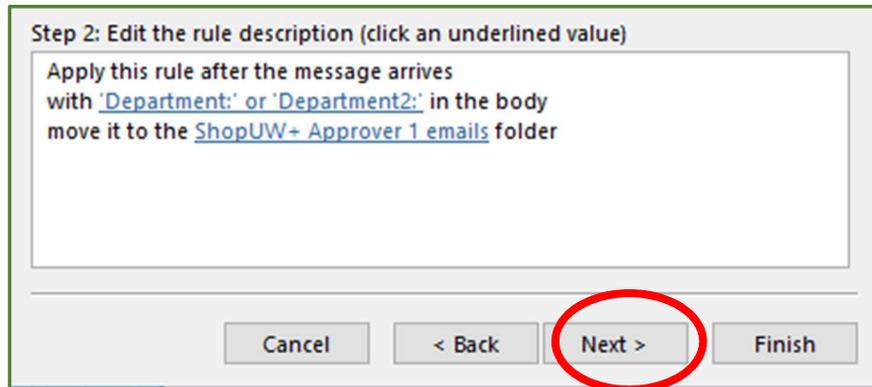
Hit Next. This is the Exception step. If you are usually a backup for Approver level 1, except for two departments, you can enter those as exceptions here.

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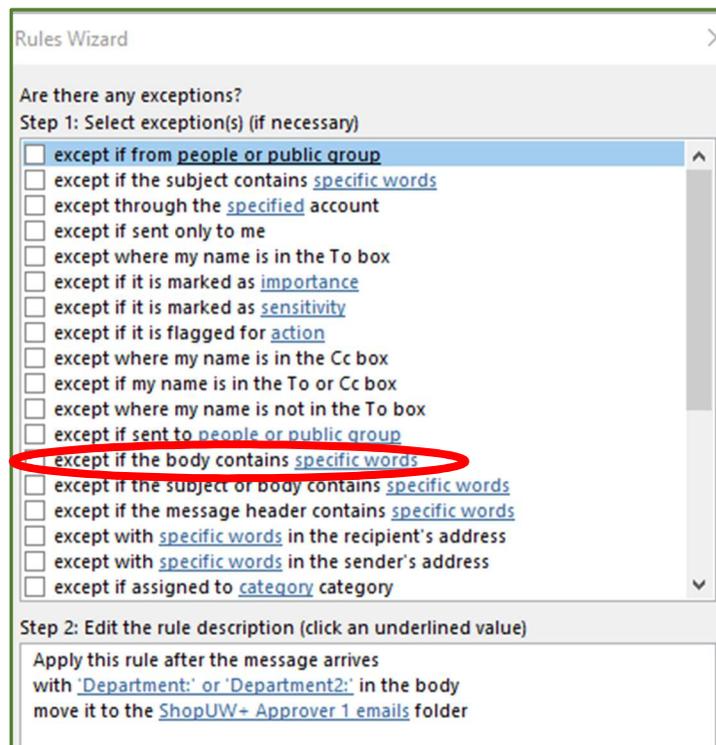
Choose the Except if the body contains specific words box. Again, click on the Specific words hyperlink.

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with 'Department:' or 'Department2:' in the body
move it to the ShopUW+ Approver 1 emails folder
except if the body contains specific words
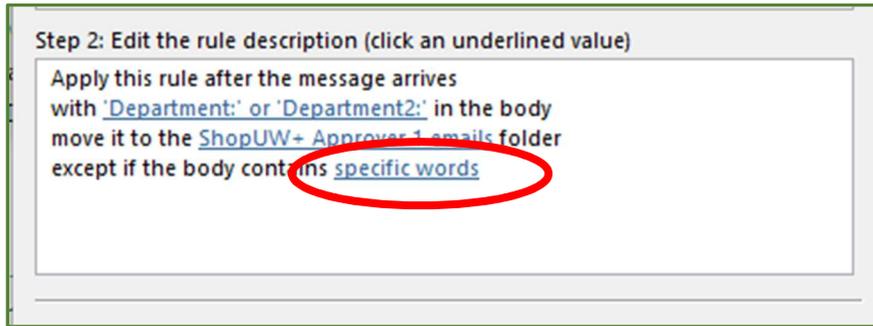
Add in the exception words. In this example, you can add the full Department: 856400_PKS or just 856400. Either should filter correctly. You can add as many specific words as you like in case you have multiple departments. Hit Ok.

Search Text

Specify words or phrases to search for in the body:

Add

Search list:
"856400"

Remove

OK   Cancel

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with 'Department:' or 'Department2:' in the body
move it to the ShopUW+ Approver 1 emails folder
except if the body contains 856400

Cancel   < Back   Next >   Finish
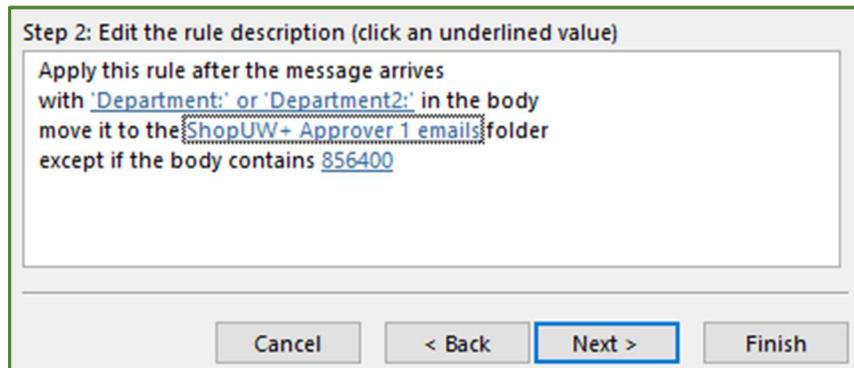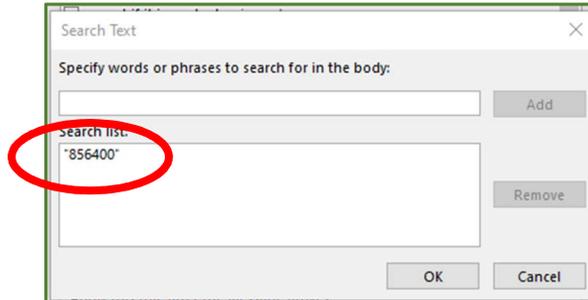
Hit the Next button.
The final step is to name the rule. I always want the rule to run against my inbox. The rule should be turned on. Review the rule. If everything looks good, hit finish.
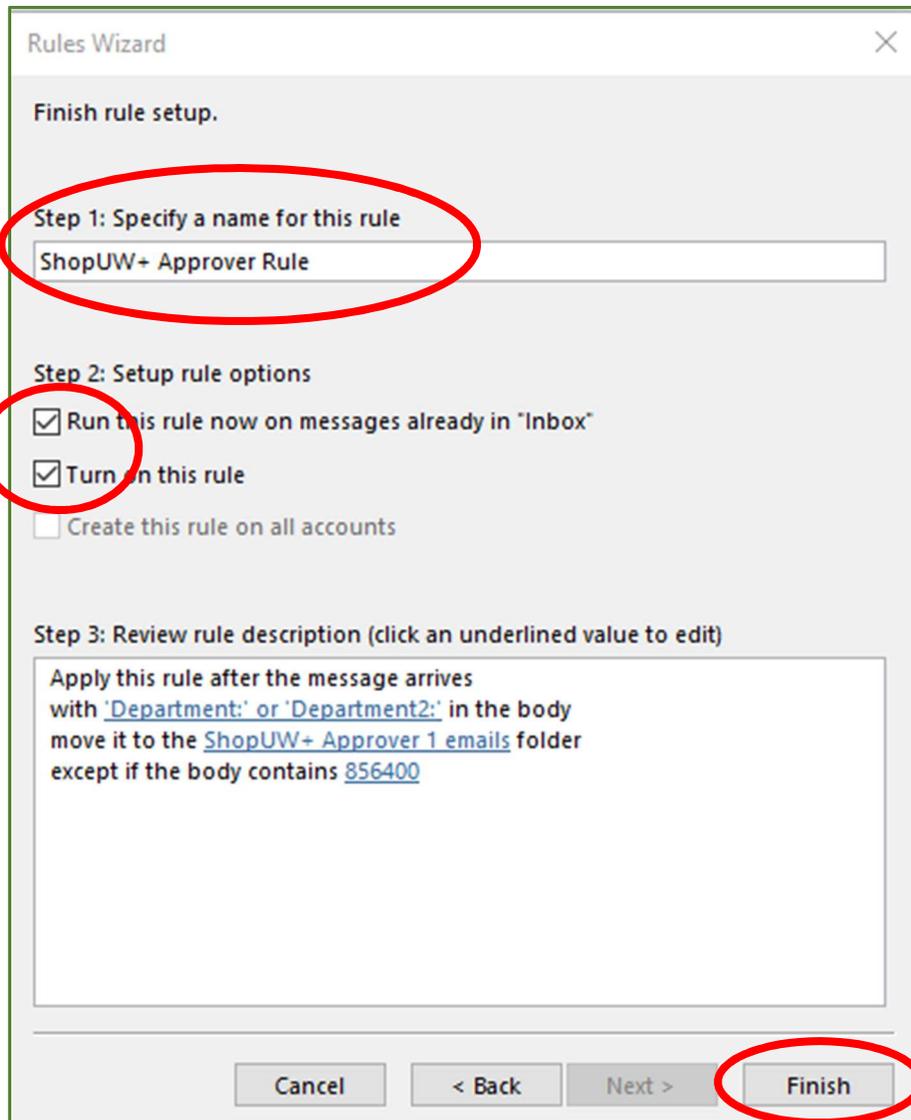
Now this rule should filter out the appropriate messages so you do not have to see them unless you want to.

You may edit the rule at any time. Go back to the Rules Icon and click on the Manage Rules and Alerts.

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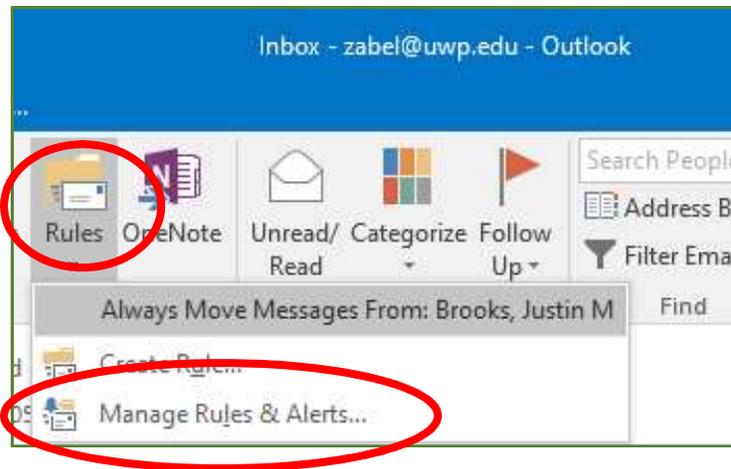
Highlight the rule you want to edit. Then click on Change Rule.
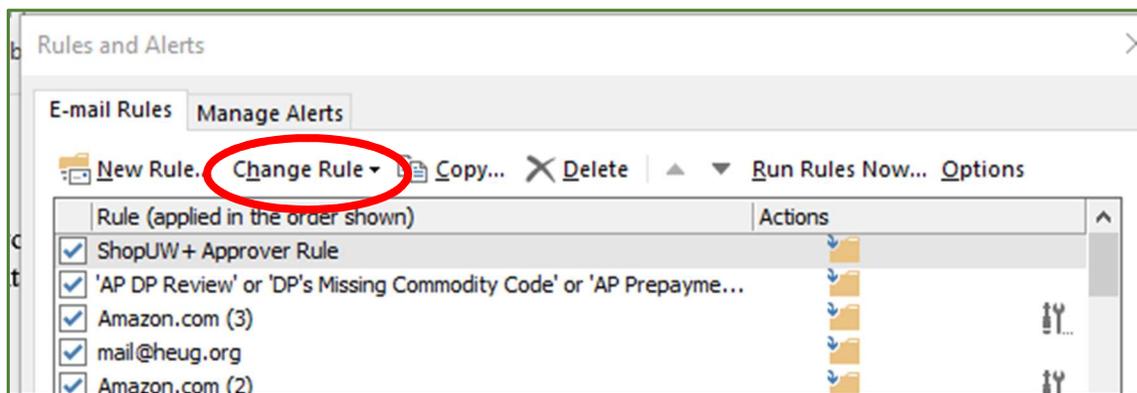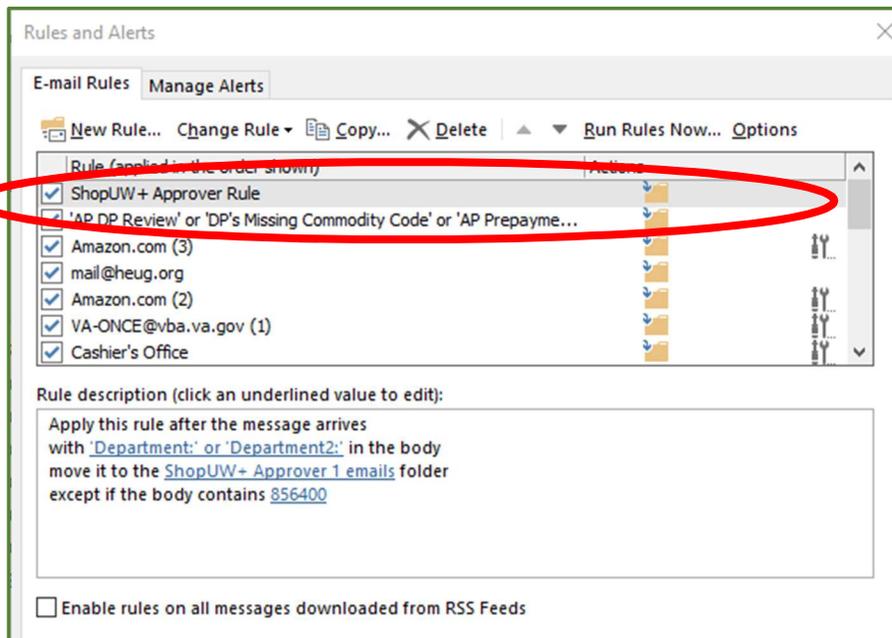
You will generally use the Edit Rule Settings… This will open up the Rule Wizard again.
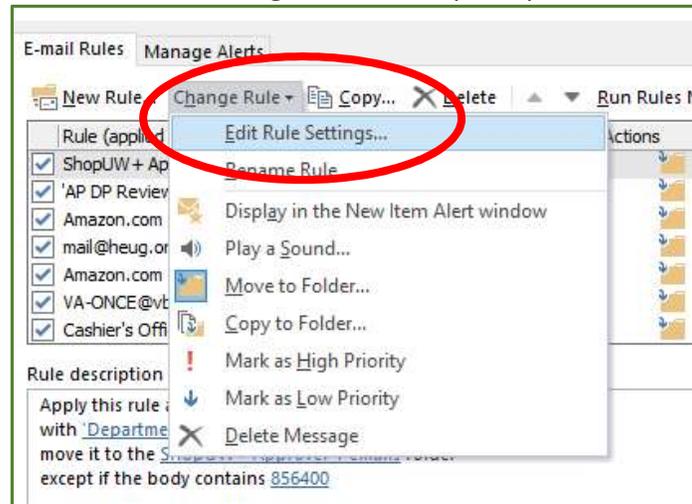
Now you can go through the previous steps as needed and make updates.

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