

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.



The Banner has the information you need:

Department: 86400_PKS (Biological Sciences): (All Values) Approval Reguest 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. Rules Unread/ Categorize F Mo Note Ŧ Read E. Move Tags

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.

Create Rule	×
When I get e-mail with all of	the selected conditions
From Montgomery, Shawn	n
Subject contains New P	Pending Approval for Invoice#: V0001786
Sent to me only	\checkmark
Do the following	
Display in the New Item A	lert window
Play a selected sound:	Windows Notify Em
Move the item to folder:	amazon Select Folder
	OK Cancel Advanced Options

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.

8			-
η	Rules Wizard	×	1
er	Which condition(s) do you want to check? Step 1: Select condition(s)		
at SI V	 from Montgomery, Shawn with FW: New Pending Approval for Invoice#: V0001786 in the subject sent to Zabel, Jennifer L with FW: New Pending Approval for Invoice#: V in the subject or body through the specified account sent only to me where my name is in the To box marked as importance marked as sensitivity 	^	ē
<u>n</u> 2	 flagged for action where my name is in the Cc box where my name is in the To or Cc box where my name is not in the ro box whith specific words in the body with specific words in the message header with specific words in the recipient's address with specific words in the sender's address assigned to category category 	~	
0	Step 2: Edit the rule description (click an underlined value) Apply this rule area the message arrives with <u>specific words</u> in the body		
/A	Cancel < Back Next > Finish	1	

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.

	Search Text	×
	Specify words or phrases to search for in the body:	Add
(Search list:	Add
	Department	Remove
	ОК	Cancel

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.

Apply this rule after the message with Department: or 'Department	arrives <u>nt2: </u> in the body	y	
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.



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.

Step 2: Edit the rul	e description (click an underlir	ned value)	
Apply this rule af	er the messag	e arrives		
with Department	: or Departme	ent2:' in the bo	dy	
move it to the spe	cified			
	Cancel	< Back	Next >	Finish

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.

Rules and Alerts			\times
Choose a folder:			
✓ ∑ zabel@uwp.edu		^	ОК
> 🗾 Inbox (7)			
> MISC			Cancel
Drafts [112]			
Sent Items			New
> O Deleted Items (1622)			
Archive			
> 🔣 Calendar			
> 💵 Contacts			
> Conversation History			
ournal 🔁			
Junk Email [44]			
Notes		~	
<	>		
	_	_	J

Name your folder. You can move it if you like. Hit Ok.

1
,
>

Now you can see the new folder. Hit Ok.



Step 2 now looks like this:

Step 2: Edit the rule description Apply this rule after the messa with 'Departments' or 'Departments'	(click an underlin ge arrives ment2:' in the boo	ned value) dv	
move it to the <u>ShopUW+ App</u>	rover 1 emails fold	der	
Cancel	< Back	Next >	Finish

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.

Are there any executions?	
Step 1: Select exception(s) (if necessary)	
except if from people or public group	^
except if the subject contains <u>specific words</u>	
except through the <u>specified</u> account	
except if sent only to me	
except where my name is in the To box	
except if it is marked as <u>importance</u>	
except if it is marked as <u>sensitivity</u>	
except if it is flagged for <u>action</u>	
except where my name is in the Cc box	
except if my name is in the To or Cc box	
except where my name is not in the To box	
except if sent to people or public group	
except if the body contains <u>specific words</u>	
except if the subject or body contains <u>specific words</u>	
except if the message header contains <u>specific words</u>	
except with <u>specific words</u> in the recipient's address	
except with <u>specific words</u> in the sender's address	
except if assigned to <u>category</u> category	~
Step 2: Edit the rule description (click an underlined value)	
Apply this rule after the message arrives	
with <u>'Department:' or 'Department2:'</u> in the body	

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

Apply this rule aff with <u>Department</u>	ter the message arrives :' or 'Department2:' in the body	
nove it to the <u>She</u>	opUW+ Approver 1 emails folder	
except if the body	y contrins <u>specific words</u>	

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.

Specify words or phrases to search for in the body:	
	Add
Search list	
856400	
	Remove

Apply this rule after	the message arrives
with Department: (or Department2: In the body
nove it to the body o	ontains 856400
except if the body of	ontains <u>656400</u>

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.

Rules Wizard	×
Finish rule setup.	
Step 1: Specify a name for this rule ShopUW+ Approver Rule	
Step 2: Setup rule options	
Run this rule now on messages already in "Inbox"	
✓ Turn in this rule	
Create this rule on all accounts	
Step 3: Review rule description (click an underlined value to edit)	
with <u>'Department:' or 'Department2:'</u> in the body	
move it to the <u>ShopUW+ Approver 1 emails</u> folder except if the body contains <u>856400</u>	
Cancel < Back Next > 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.



Highlight the rule you want to edit. Then click on Change Rule.

ShopLW + Approver Rule	V	
AP DP Review' or 'DP's Missing Commodity Code' or 'AP Prepayme.		
Amazon.com (3)	v ~	iΥ
✓ mail@heug.org	2	= 1
Amazon.com (2)	2	IΥ
VA-ONCE@vba.va.gov (1)	2	ĬŸ
Cashier's Office	2	ĪĻ
Rule description (click an underlined value to edit): Apply this rule after the message arrives with <u>'Department:' or 'Department2:'</u> in the body move it to the <u>ShopUW+ Approver 1 emails</u> folder except if the body contains <u>856400</u>		

b	Rules and Alerts		×
-	E-mail Rules Manage Alerts		
	💼 <u>N</u> ew Rule. C <u>h</u> ange Rule 🕶 📄 <u>C</u> opy 🗙 <u>D</u> elete 🔺 💌 <u>R</u> un Rules Now <u>O</u> ptions		
	Rule (applied in the order shown) Actions		^
c	ShopUW + Approver Rule		
t	✓ 'AP DP Review' or 'DP's Missing Commodity Code' or 'AP Prepayme		
Ш	Amazon.com (3)	İΥ	
Ш	✓ mail@heug.org		
	Amazon.com (2)	11	

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.