#### **Worklist & Notifications**



This Job Aid walks through the process of communicating with regards to financial transactions, via GUS Worklist and Notifications.

After you submit a transaction (Invoices, Expense Reports, Requisitions, etc.), communication may need to take place between auditors, requesters, supervisors, and other individuals on campus. This is accomplished through the worklist and notifications. When someone requests information from you, you will receive both an e-mail and a notification in GUS Cloud.

GUS Cloud Finance Test						<b>î</b> *	ی 🔌 ۴	? DeptAdmin Test <del>v</del>
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Step	Action
1.	Log into GUS Cloud.



Step	Action	
2.	Your <b>Notification Bell</b> indicates the number of u To mark these notifications as read, you must cli notification link. Items should remain available the bell for 30 days.	Inread notifications you have. ck on the bell and click the for searching and viewing under
	🟫 What do you need to do or find? <b>Q</b>	* * ()
	Recent Notifications	More Details 🔻
	Enter search terms	्
	<ul> <li>Transferred:Expense Report Approval EXP0009432568 for Rachel Cameron (USD 12,000.00)</li> </ul>	9/12/16
	Information Requested:Approval of Invoice 123456789101112131415 from VAGUELY QUALIFIED PRODUCTIONS 0000479221 (987.65 USD)	9/9/16 Pay
	<b>Tip:</b> Common notifications include Information and FYI.	Requested, Action Required,



<b>^</b>		
	What do you need to do or find?	★ F Service S
• Rec	ent Notifications	More Details
Ent	er search terms	Einancials
•	FYI:Document (Purchase Order) PON26 (Requisition REQ543) Implemented	32 Human Capital Management
•	Action Required:Approve Requisition REQ543	Incentive Compensation Procurement
Inve	FYI:Document (Purchase Order) PON26 (Requisition REQ542) Implemented	Projects
•	Action Required:Approve Requisition REQ542	Supply Chain Management
orpora	Action Required:Approve Requisition REQ539	8:57 AM
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The BP	M Worklist has several different	ent viewing options for users.
• '	Tasks assigned to you	
	Tasks you initiated	
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	•	Title	Number Creator	Assigned	Priority
Inbox	?	Approval of Invoice 123456789101112131415 from VAGUELY C	201451 Rachel Can	neron 9/9/16 2:35 PM	3 🗸
My Tasks (33)	?	Expense Report Approval EXP0009428552 for Rachel Camero	201438 Rachel Can	neron 9/9/16 2:29 PM	3
Initiated Tasks	Ê	Hold Incomplete invoice on Invoice 5330497	201370	9/8/16 8:32 AM	3
Administrative Tasks	Ê	Hold Incomplete invoice on Invoice Invalid-10004	201368	9/8/16 8:32 AM	3
Views	Ê	Hold Incomplete invoice on Invoice 06151	201348	9/7/16 1:19 PM	3
Viewa	Ê	Hold Incomplete invoice on Invoice 7883931	201347	9/7/16 1:19 PM	3
Due Soon	Ê	Hold Incomplete invoice on Invoice Y-FFESND1WORKFIOWMA	201337	9/7/16 1:19 PM	3
High Priority	Ê	Hold Incomplete invoice on Invoice 10019	201336	9/7/16 1:19 PM	3
Past Day	Ê	Expense Auditor Has Requested More Information for Expense	201275 Misty Button	9/6/16 10:24 AM	3
Past Week	?	Approval of Invoice 123-test from BROADWAY ELECTRONICS I	201288 Teresa Kola	rik 9/6/16 2:31 PM	3
Past Month	° 💼	Expense Report Approval EXP0009242038 for Teresa Kolarik (	201167 Teresa Kola	rik 9/2/16 12:21 PM	3
Past Quarter	Ê	Hold Incomplete invoice on Invoice Invalid-7001	201081	8/29/16 12:02 PM	3
New Teele	Ê	Hold Incomplete invoice on Invoice Duplicate-5054	201047	8/26/16 2:51 PM	3
New Tasks	Ê	Hold Incomplete invoice on Invoice 512989R	201014	8/25/16 2:22 PM	3
My Views	Ê	Hold Incomplete invoice on Invoice Duplicate-5012	201012	8/25/16 2:22 PM	3
Rachel's View	Ê	Hold Incomplete invoice on Invoice Duplicate-5013	201030	8/25/16 2:22 PM	3
	Ê	Expense Report Approval EXP0009121355 for James Compton	200942 James Con	pton 8/18/16 11:26 AM	3
	Ê	Hold Incomplete invoice on Invoice Duplicate-4003	200661	8/11/16 9:46 AM	3
	Ê	Hold Incomplete invoice on Invoice 25273706L5	200650	8/11/16 9:46 AM	3
	Ê	Hold Incomplete invoice on Invoice 88710987001	200660	8/11/16 9:46 AM	3
	Ê	Hold Incomplete invoice on Invoice Duplicate-4002	200649	8/11/16 9:46 AM	3
	Ê	Hold Incomplete invoice on Invoice 1FOR	200250	7/28/16 11:08 AM	3
	Ê	Hold Incomplete invoice on Invoice B04330264	200248	7/28/16 11:08 AM	3
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5	Action 201
5.	When someone requests information from you, you will see the same task in both the Notification Bell, and the Worklist.
	🕋 What do you need to do or find? Q ★ 🌾 🔊 💶
	Recent Notifications More Details
	Enter search terms
	Information Requested:Approval of Invoice 4:05 PM     8888888 from VAGUELY QUALIFIED     PRODUCTIONS 0000479221 (25.00 USD)
	Worklist: Notifications and Approvals
	Financials Human Capital Management Incentive Compensation Procurement Projects
	My Tasks 🔻 Actions 👻 View 👻 💿 💿 🔍 🔍 Assigned 🔍
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Information reque	sted for an invoic	e:			
Approval of Invoice 0041750	-1M from MISSION ELECTRO	NICS INC 000005127	9 (416.00 USD)		Actions <b>v</b>
Assignee Rachel Cameron	Supplier or Party	MISSION ELECTRONICS INC 0000051279	Invoice Number	0041750-1M	
From Teresa Kolarik	Supplier Site	CHK1	Invoice Date	9/29/15	
Assigned Date 9/9/16 12:02 PM	Business Unit	PSU Business Unit	Description	Lab Stuff	
Task Number 201395	Requester	Teresa Kolarik	Payment Currency	USD	
			Invoice Total	416.00 USD	
Amount Summary		Cost Center	er Summary		
Line Type		Amount Cost Center			Amount
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Step	Action			
	Information Requested for a re	equisition:		
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	Vers + Frend + Effects (Ended) of Strap Line Annual then Description • 4759 100 Loss (A Carlog In Carl Commit Marks 7	Suggreted Suppler CATTEDE HID OF KANSAR IN: 080168772	Charge Account         Quant         Price           H05-H20195-525185-0-8         1         47.97 USD	Charge Account Segment Description           0315         Description           0315         Description           0315         Description
	d Comment: 19334 53 PM Please did Montetion on whee prieter the a fort? Traves.	+ & Attachments Kie datu te deplay		÷×
	Each information request will well as who is requesting the inplace.	show you basic deta nformation and any	ils about the tr comments that	ansaction involved, as thave already taken



Step	Action
7.	Add comments or attachments by clicking on the + button.
	▲ Comments +
	9/6/16 10:12 AM Misty Button This is my request for more information
	✓ Attachments → + ×
	No data to display
	Enter your comment, or attach your document. Then click ok.
	Add Comment
	* Comment This is my submitted information.
	O <u>K</u> Can <u>c</u> el
	Add Attachment
	Note: Make sure that all previous updates to task including url attachments are saved before uploading file.
	Attachment Type <ul> <li>Desktop File</li> <li>URL</li> </ul> * File Name       Browse       No file selected.
	O <u>K</u> Can <u>c</u> el





Step	Action
8.	Action To complete the task, you much click on Actions>Submit Information.
	your list until you have submitted information.



9.	Choosing 'Reassign' will transfer the responsibility of providing additional information to another person.
	<ul> <li>Reassign- If you are seeking information from another Gus Cloud User, use the Reassign Task function.</li> <li>Search for a single User by Name or Email address.</li> <li>Check box your selected user.</li> <li>Click OK- This will immediately send your request to the select user.</li> </ul>
	Actions   Reassign   Submit Information   Save
	Reassign lask X
	Reassign tasks to one or more users.
	This will transfer ownership of the task and remove it from your worklist.      Reassign (transfer task to another user or group)
	Delegate (allow specified user to act on my behalf)
	Users V
	✓ Advanced
	First Name Jam Last Name Compton
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	Search Reset
	First Last Free Table
	Select Name Name Email Inte Ma
	Signature Compton jcompton@pittst bw
	Select All Select None
	OK Cancel



Step	Action	
10.	Once requested information has been provided, future approve comments/attachments sections.	ers will see it in the
	Expense Date Imaged Receipt Receipt Missing An Required	nount (USD) Expense Class
	International - Mileage 9/2/16	1.08 Business
	<ul> <li>Comments             </li> <li>9/6/16 10:31 AM Rachel Cameron             </li> <li>This is my submitted information.             </li> <li>9/6/16 10:12 AM Misty Button             </li> <li>This is my request for more information         </li> </ul> No data to display <ul> <li>No data to display</li> </ul>	
11.	You have reached the end of the Worklist & Notification Job	Aid.