

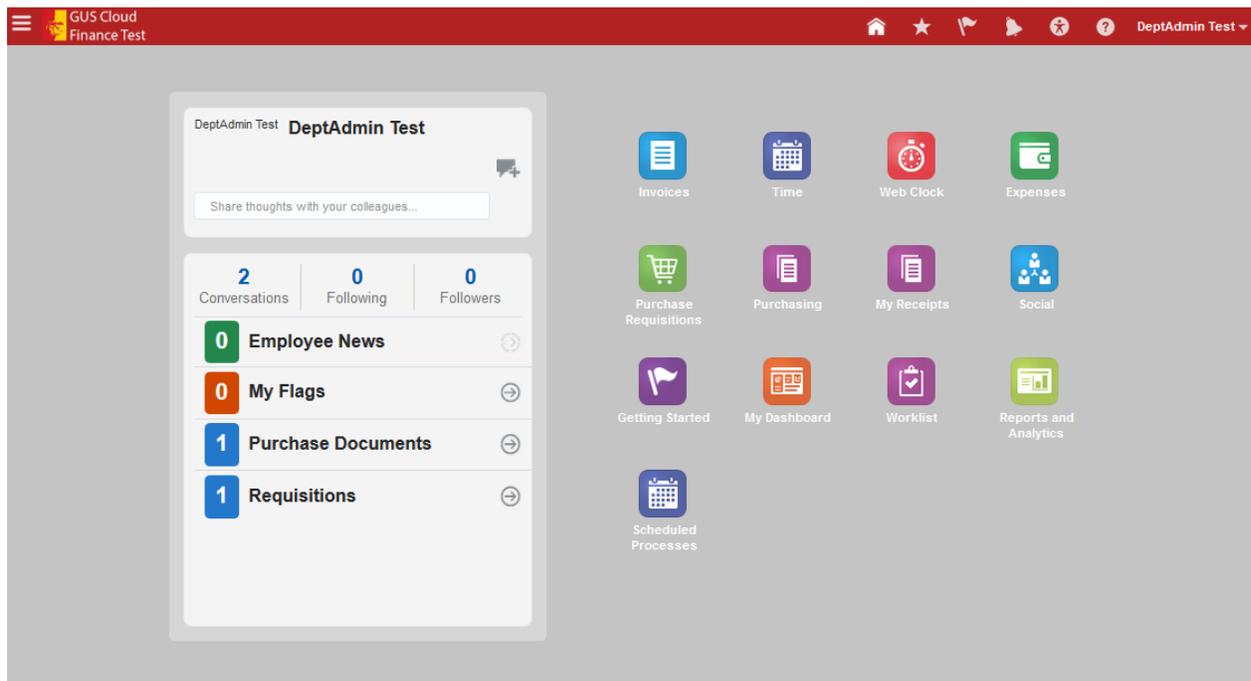
Job Aid

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.

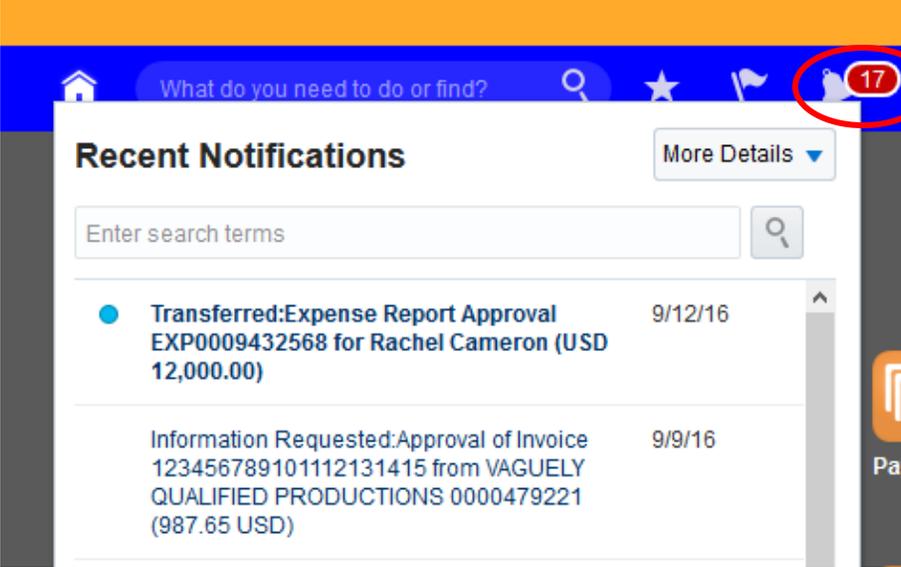


Step	Action
1.	Log into GUS Cloud.

Job Aid

Worklist & Notifications



Step	Action
2.	<p>Your Notification Bell indicates the number of unread notifications you have. To mark these notifications as read, you must click on the bell and click the notification link. Items should remain available for searching and viewing under the bell for 30 days.</p>  <p>Tip: Common notifications include Information Requested, Action Required, and FYI.</p>

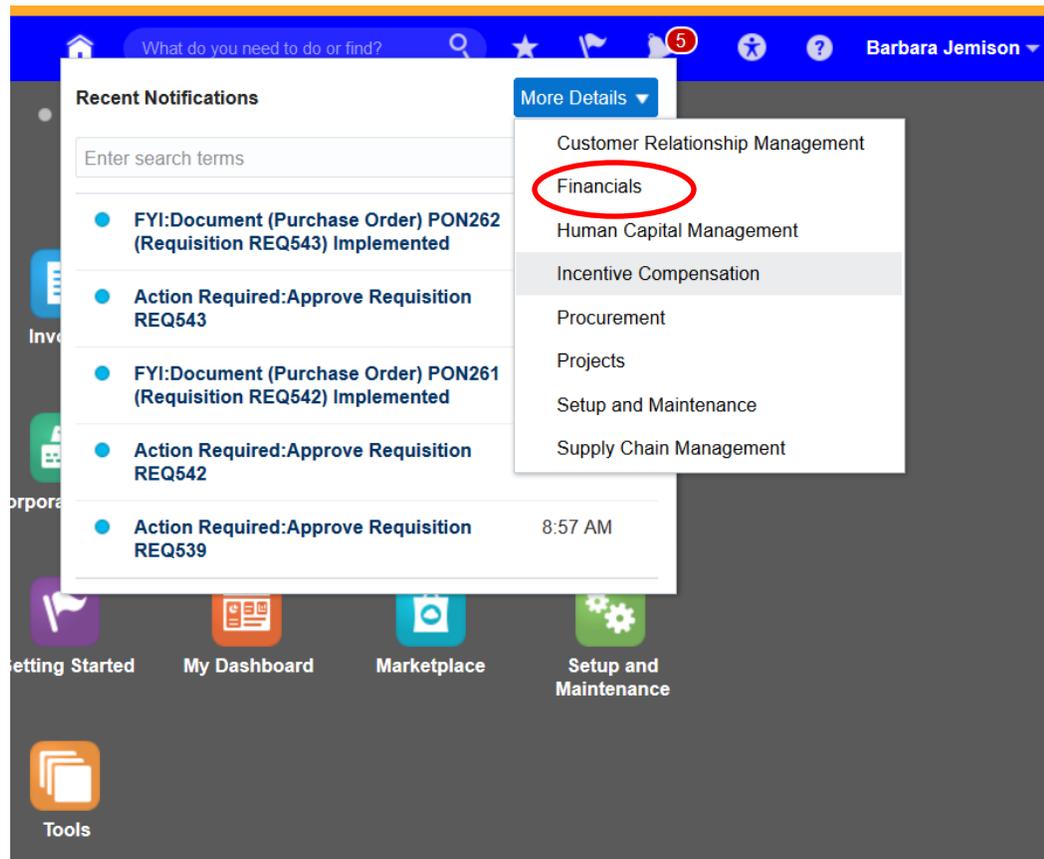
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Worklist & Notifications



3.

Selecting the drop down for More Details under notifications bell will give you options for which tab of the BPM worklist you want to navigate to. The BPM Worklist is an expanded and searchable view of the Notification Bell.



The BPM Worklist has several different viewing options for users.

- Tasks assigned to you
- Tasks you initiated
- Completed Tasks
- All Tasks

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Worklist & Notifications



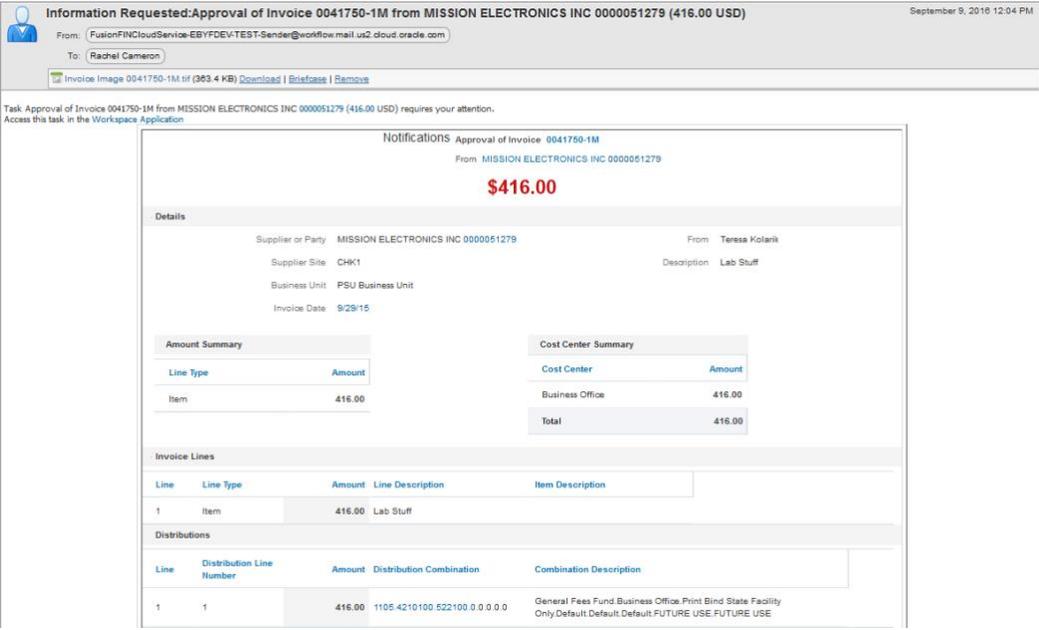
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All rights reserved.</p>	Title	Number	Creator	Assigned	Priority	Approval of Invoice 123456789101112131415 from VAGUELY C	201451	Rachel Cameron	9/9/16 2:35 PM	3	Expense Report Approval EXP0009428552 for Rachel Camero	201438	Rachel Cameron	9/9/16 2:29 PM	3	Hold Incomplete invoice on Invoice 5330497	201370		9/8/16 8:32 AM	3	Hold Incomplete invoice on Invoice Invalid-10004	201368		9/8/16 8:32 AM	3	Hold Incomplete invoice on Invoice 06151	201348		9/7/16 1:19 PM	3	Hold Incomplete invoice on Invoice 7883931	201347		9/7/16 1:19 PM	3	Hold Incomplete invoice on Invoice Y-FFESND1WORKFIOWMA	201337		9/7/16 1:19 PM	3	Hold Incomplete invoice on Invoice 10019	201336		9/7/16 1:19 PM	3	Expense Auditor Has Requested More Information for Expense	201275	Misty Button	9/6/16 10:24 AM	3	Approval of Invoice 123-test from BROADWAY ELECTRONICS I	201288	Teresa Kolarik	9/6/16 2:31 PM	3	Expense Report Approval EXP0009242038 for Teresa Kolarik (201167	Teresa Kolarik	9/2/16 12:21 PM	3	Hold Incomplete invoice on Invoice Invalid-7001	201081		8/29/16 12:02 PM	3	Hold Incomplete invoice on Invoice Duplicate-5054	201047		8/26/16 2:51 PM	3	Hold Incomplete invoice on Invoice 512989R	201014		8/25/16 2:22 PM	3	Hold Incomplete invoice on Invoice Duplicate-5012	201012		8/25/16 2:22 PM	3	Hold Incomplete invoice on Invoice Duplicate-5013	201030		8/25/16 2:22 PM	3	Expense Report Approval EXP0009121355 for James Compton	200942	James Compton	8/18/16 11:26 AM	3	Hold Incomplete invoice on Invoice Duplicate-4003	200661		8/11/16 9:46 AM	3	Hold Incomplete invoice on Invoice 25273706L5	200650		8/11/16 9:46 AM	3	Hold Incomplete invoice on Invoice 88710987001	200660		8/11/16 9:46 AM	3	Hold Incomplete invoice on Invoice Duplicate-4002	200649		8/11/16 9:46 AM	3	Hold Incomplete invoice on Invoice 1FOR	200250		7/28/16 11:08 AM	3	Hold Incomplete invoice on Invoice B04330264	200248		7/28/16 11:08 AM	3
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Note: BPM Worklist opens in a new browser window. Make sure pop-ups are allowed for GUS Cloud in your browser.

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Worklist & Notifications



Step	Action
5.	<p>When someone requests information from you, you will see the same task in both the Notification Bell, and the Worklist.</p>  <p>You could have also received an e-mail from Fusion Cloud Services with a subject including 'Information Requested'. You can click on the Workspace Application link in the e-mail to navigate directly to this task in GUS Cloud.</p>  <p>Tip: You may need to sign in to GUS Cloud using single sign on if you are not already signed in.</p>

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Worklist & Notifications



6.

Information requests are similar across all modules, but can have different layouts and formatting. Look for the comment first in all modules. This will tell you what information has been requested and who requested it.

Information requested for an invoice:

Approval of Invoice 0041750-1M from MISSION ELECTRONICS INC 0000051279 (416.00 USD) Actions ▾

Details

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

Line Type	Amount
Item	416.00
Total	416.00

Cost Center Summary

Cost Center	Amount
Business Office	416.00
Total	416.00

Invoice Lines Edit Distributions

Line	Line Type	Amount	Item Description	Supplier Item
1	Item	416.00		

Comments

9/9/16 12:04 PM Teresa Kolarik
I don't think the attachment matches the invoice. Can you please review.

Attachments

Invoice image 0041750-1M.tif

History

Information requested for an expense report:

Expense Report Approval EXP0009288966 for Rachel Cameron (USD 1.08) Actions ▾

Details

Assignee: Rachel Cameron	Report Period: 9/2/16 - 9/2/16
From: Cameron, Rachel	Report Total: 1.08 USD
Assigned Date: 9/2/16 4:44 PM	Submission Date: 9/2/16
Task Number: 201270	Purpose:

Expense Items

View ▾ Format ▾ Detach Wrap

Expense	Date	Imaged Receipt Required	Receipt Missing	Amount (USD)	Expense Class
International - Mileage	9/2/16	—	—	1.08	Business

Columns Hidden: 5

Comments

9/6/16 10:31 AM Rachel Cameron
This is my submitted information.

9/6/16 10:12 AM Misty Button
This is my request for more information.

Attachments

No data to display

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Worklist & Notifications



Step	Action																		
	<p data-bbox="363 365 834 401">Information Requested for a requisition:</p> <div data-bbox="363 432 1406 816" style="border: 2px solid red; padding: 10px;"><p data-bbox="370 438 456 449">Approve Requisition REQ207</p><p data-bbox="370 457 418 468">Details</p><div data-bbox="496 459 634 548" style="border: 1px solid red; padding: 5px;"><p data-bbox="509 485 610 548">Assignee: Barbara Jensen From: Barbara Jensen Assigned Date: 9/13/16 9:20 AM Track Number: 200760</p></div><div data-bbox="1008 485 1143 617"><p data-bbox="1008 485 1122 495">Requesting BU: PSD Business Unit</p><p data-bbox="1008 501 1110 512">Entered By: Megan Workman</p><p data-bbox="1008 518 1101 529">Requisition Amount: 47.87 USD</p><p data-bbox="1008 535 1094 546">Nonrecoverable Tax: 0.00 USD</p><p data-bbox="1008 552 1101 562">Approval Amount: 47.87 USD</p><p data-bbox="1008 569 1105 579">Funds Status: Not reserved</p><p data-bbox="1008 585 1143 596">Description: 850L Ink Cartridge Tri Color</p><p data-bbox="1008 602 1062 613">Justification:</p></div><p data-bbox="370 632 440 642">Requisition Lines</p><p data-bbox="370 657 553 667">View: Formal Freeze Details Wrap</p><table border="1" data-bbox="370 674 1390 730"><thead><tr><th>Line</th><th>Amount</th><th>Item Description</th><th>Suggested Supplier</th><th>Charge Account</th><th>Quant</th><th>Price</th><th>Amount (USD)</th><th>Charge Account Segment Description</th></tr></thead><tbody><tr><td>1</td><td>47.87 USD</td><td>850L Ink Cartridge Tri Color</td><td>CARTRIDGE KING OF KANSAS INC 0000188772</td><td>1105-1102185-520188-0-5-</td><td>1</td><td>47.87 USD</td><td>47.87</td><td>General Fees Funds/Kenexa Dean's Office/Block Avid Logging In Data/Default/Default/Def.</td></tr></tbody></table><p data-bbox="370 737 456 747">Columns Hidden: 7</p><div data-bbox="370 758 862 810" style="border: 1px solid red; padding: 5px;"><p data-bbox="370 764 423 774">Comments</p><p data-bbox="370 781 537 802">9/13/16 1:58 PM Please add information on whose printer this is for? Thanks.</p></div><div data-bbox="870 758 1390 810" style="border: 1px solid red; padding: 5px;"><p data-bbox="870 764 940 774">Attachments</p><p data-bbox="870 781 940 802">No data to display</p></div></div> <p data-bbox="363 856 1390 953">Each information request will show you basic details about the transaction involved, as well as who is requesting the information and any comments that have already taken place.</p>	Line	Amount	Item Description	Suggested Supplier	Charge Account	Quant	Price	Amount (USD)	Charge Account Segment Description	1	47.87 USD	850L Ink Cartridge Tri Color	CARTRIDGE KING OF KANSAS INC 0000188772	1105-1102185-520188-0-5-	1	47.87 USD	47.87	General Fees Funds/Kenexa Dean's Office/Block Avid Logging In Data/Default/Default/Def.
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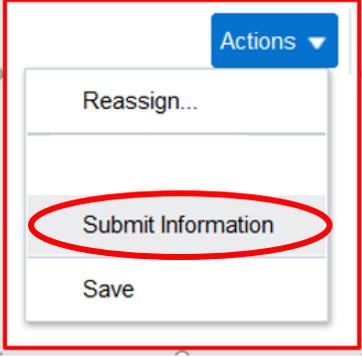


Step	Action
7.	<p data-bbox="367 369 1114 401">Add comments or attachments by clicking on the + button.</p> <div data-bbox="367 457 1390 747"><p data-bbox="375 464 529 489">▲ Comments → +</p><hr/><p data-bbox="375 531 691 579">9/6/16 10:12 AM Misty Button This is my request for more information</p><hr/><p data-bbox="375 663 1390 695">▲ Attachments → + ×</p><hr/><p data-bbox="375 720 521 741">No data to display</p></div> <p data-bbox="367 852 1162 884">Enter your comment, or attach your document. Then click ok.</p> <div data-bbox="367 919 1187 1150"><p data-bbox="375 930 513 951">Add Comment</p><p data-bbox="375 993 1162 1083">* Comment <input type="text" value="This is my submitted information."/></p><p data-bbox="1049 1104 1170 1136"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p></div> <div data-bbox="367 1188 1235 1440"><p data-bbox="375 1199 545 1220">Add Attachment</p><p data-bbox="375 1251 1203 1272">Note: Make sure that all previous updates to task including url attachments are saved before uploading file.</p><p data-bbox="375 1287 748 1314">Attachment Type <input checked="" type="radio"/> Desktop File <input type="radio"/> URL</p><p data-bbox="431 1339 781 1367">* File Name <input type="button" value="Browse..."/> No file selected.</p><p data-bbox="1081 1388 1219 1419"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p></div>

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Worklist & Notifications



Step	Action
8.	<p data-bbox="365 369 1268 401">To complete the task, you much click on Actions>Submit Information.</p> <div data-bbox="365 443 727 800">A screenshot of a software interface showing a dropdown menu. The menu is titled 'Actions' in a blue box with a downward arrow. Below the title, there are three options: 'Reassign...', 'Submit Information', and 'Save'. The 'Submit Information' option is highlighted with a red oval, and the entire menu area is enclosed in a red rectangular border.</div> <p data-bbox="365 842 1365 909">To save the item for later, click Save. This worklist notification will remain on your list until you have submitted information.</p>

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Worklist & Notifications

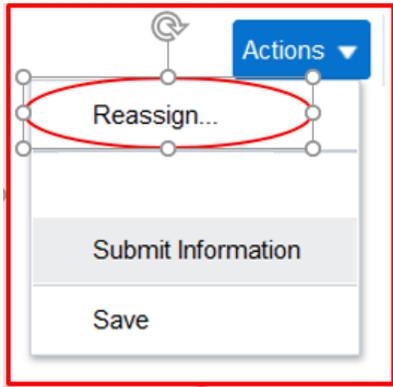


9.

Choosing 'Reassign' will transfer the responsibility of providing additional information to another person.

Reassign- If you are seeking information from another Gus Cloud User, use the Reassign Task function.

- Search for a single User by Name or Email address.
- Check box your selected user.
- Click OK- This will immediately send your request to the select user.



reassign task

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

Advanced

First Name Last Name
Email ID

Select	First Name	Last Name	Email	Title	Ma
<input checked="" type="checkbox"/>	jcompt	James Compton	jcompton@pittst...		bw

Selected

Job Aid

Worklist & Notifications



Step	Action												
10.	<p>Once requested information has been provided, future approvers will see it in the comments/attachments sections.</p> <div data-bbox="365 472 1409 850" style="border: 1px solid red; padding: 5px;"><p>Expense Items</p><p>View ▾ Format ▾ Detach Wrap</p><table border="1"><thead><tr><th>Expense</th><th>Date</th><th>Imaged Receipt Required</th><th>Receipt Missing</th><th>Amount (USD)</th><th>Expense Class</th></tr></thead><tbody><tr><td>International - Mileage</td><td>9/2/16</td><td>—</td><td>—</td><td>1.08</td><td>Business</td></tr></tbody></table><p>Columns Hidden 5</p><p>Comments</p><p>9/6/16 10:31 AM Rachel Cameron This is my submitted information.</p><p>9/6/16 10:12 AM Misty Button This is my request for more information</p><p>Attachments</p><p>No data to display</p></div>	Expense	Date	Imaged Receipt Required	Receipt Missing	Amount (USD)	Expense Class	International - Mileage	9/2/16	—	—	1.08	Business
Expense	Date	Imaged Receipt Required	Receipt Missing	Amount (USD)	Expense Class								
International - Mileage	9/2/16	—	—	1.08	Business								
11.	You have reached the end of the Worklist & Notification Job Aid.												