

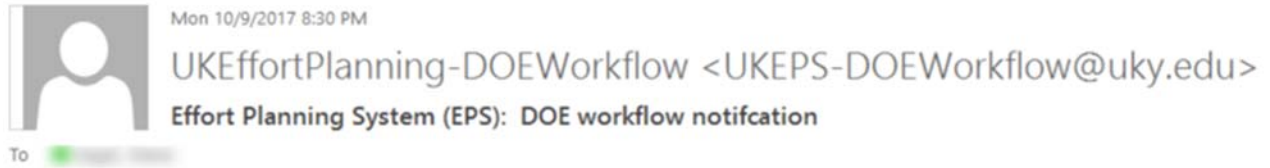
The Effort Planning System (EPS) sends email notifications to the faculty member, workflow participants and administrative support staff. The email comes from sender “UKEffortPlanning-DOEWorkflow”.

Notification content:	
DOE Workflow – two categories of notifications:	Frequency
1) New Action Items: DOEs needing review or signature by recipient	Daily
2) Workflow progress: Status changes for DOEs that have been signed or reviewed by the recipient, grouped by workflow step	Daily
Alerts (not yet implemented)	Daily
Changes in academic appointment, administrative assignment, or other DOE related data which may require a new version.	

Additional details:

- Emails are generated nightly, and all notifications are included in one email.
- A particular notification is sent only once by the nightly process.
- The version 1 DOE has no special notation. Subsequent versions or new tracks are noted.
- Only workflow progress for signature steps are reported. This includes the chair or director signature, faculty signature, multidisciplinary center director signature (if applicable), and dean signature. “Review” steps at educational unit or college level are not reported.
- For the faculty signature step, if the faculty member signs and adds comments the DOE is noted as “comments added by the faculty member”. The specific comments are not included in the email at the present, but will be added as a future enhancement.
- Only the most current workflow progress change is reported to avoid redundancy in the email. For example, if the faculty signature and dean signature have both occurred since the last notification, only the dean signature would be reported. This assumes the recipient understands that the faculty signature occurs before the dean signature.
- If the DOE is returned to the unit business office, all persons participating in the workflow up to the point of return are notified, including the faculty member.
- If the DOE is returned to the chair by the faculty member, the chair receives a new action item notification. No others are notified. The DOE is noted as “returned by faculty member”.
- If the DOE is returned to the unit business office, all persons with the “Unit Business Office-Initiation” role and the “Education Unit Manager” role are notified. This would include chairs who have been given the “Unit Business Office-Initiation” role.
- Individuals are not notified of changes they make. For example, the person signing the DOE in the dean role is not notified that the DOE has been signed at the dean’s level.

Email content examples:



DO NOT REPLY TO THIS EMAIL

To faculty, "new action item"

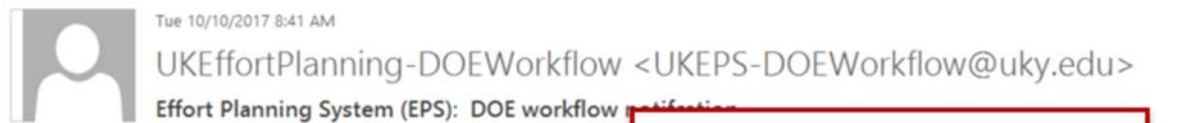
Dear [Redacted Name],

Your DOE is ready for signature in EPS.

All emails include these instructions

***** How to access Effort Planning System *****

- Use CHROME or FIREFOX browser
- Logon to myUK portal
- Select Enterprises Services tab OR Faculty Services tab
- Select Effort Planning sub-tab
- Follow the link "Effort Planning System (EPS)"



DO NOT REPLY TO THIS EMAIL

To faculty, "workflow progress"

Dear [Redacted Name],

Your DOE has been signed by the dean and approvals are complete.

***** How to access Effort Planning System *****

- Use CHROME or FIREFOX browser
- Logon to myUK portal
- Select Enterprises Services tab OR Faculty Services tab
- Select Effort Planning sub-tab
- Follow the link "Effort Planning System (EPS)"



Tue 10/10/2017 4:36 PM

UKEffortPlanning-DOEWorkflow <UKEPS-DOEW-Workflow@du.edu>

Effort Planning System (EPS): DOE workflow notif

To faculty administrator who participates in the workflow (e.g. chair)

DO NOT REPLY TO THIS EMAIL

Dear [Name],

Messages related to individual's own DOE

Your DOE has been signed by the dean and approvals are complete. Your DOE (Version 2) is ready for signature in EPS.

Listed below are DOEs needing your review or signature and/or DOEs that have changed status in the workflow since the last notification - for your information. Please contact your department business office if you have questions about the process. See the end of this email for instructions on how to access EPS.

DOEs ready for your review or signature:

New action items

- [Name] (Version 2)
- [Name] (returned by the faculty member)
- [Name] (Version 2)
- [Name] (Version 2)

DOEs with change in status since last notification:

Workflow progress

- DOE has been signed by the faculty member.
- [Name] (comments added by the faculty member)
- DOE has been signed by the dean and approvals are complete.
- [Name]
- [Name]
- [Name]
- [Name]
- [Name]