**Purpose:** Use this QRG to... Navigate EvoNotify  
Hyperlinks & Jump Links – Select under the Table of Contents QRG for quick reference  
Cautions: Use all caps with text when entering information.

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### Logging On

1. Go to Finance Launchpad  
2.  
3.  

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Last Updated 06/23/2023  
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**Home Screen**

The Evo Notify Home screen is divided into two sections:
- **TOP:** Search and Filter Bar (what information you want to see)
- **BOTTOM:** Notification list (what information you need and the order you want it in)

*Both sections are customizable to your specific area/needs. Once the view is saved, you will have access to it in the future.*

**Creating a Notification**

To create a notification, click on ++ Create Notification ++.

**Notification Description**

- Enter Notification Description text here.

**Notification Type**

*Type or select using pop-out box 😇.

A selection here will populate the ‘Reported By’ field.

AF= Affiliate funded

O1= O&M funded

O4= Dept. Funded

OR= Student Life funded

*Please only use these notification types*
### Priority

Type priority or select using the pop-out search box.

Double click the priority needed.

Starting with the Building Code, Floor Description, and then Room will help to filter down to specific equipment.

If you know the Equipment Number or Room Equipment Number, you may enter that first and the other fields (*Building Code, Floor Desc., Room, FLOC, Maintenance Workcenter, & Building Deputy info*) should autofill.

This information is being pulled from the master data record in SAP; therefore, an Equipment Number or Room Equipment Number must be selected.

### Building Code

- Type the building abbreviation (code) and use mouse to select the Building Code from the list. You can also use the pop-out search box.

---

**Priority**

<table>
<thead>
<tr>
<th>Priority</th>
<th>Priority Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Safety</td>
</tr>
<tr>
<td>1</td>
<td>Urgent</td>
</tr>
<tr>
<td>2</td>
<td>High &lt;2d to 7d&gt;</td>
</tr>
<tr>
<td>3</td>
<td>Mid &lt;next sched&gt;</td>
</tr>
<tr>
<td>4</td>
<td>Low &lt;12d to 30d&gt;</td>
</tr>
<tr>
<td>5</td>
<td>Foreign &lt;30 to 1Y&gt;</td>
</tr>
<tr>
<td>C</td>
<td>Customer Request</td>
</tr>
</tbody>
</table>

**Building Code**

- Type the building abbreviation (code) and use mouse to select the Building Code from the list. You can also use the pop-out search box.
**Floor Description**
- Type the floor description (Ex. 1ST FLOOR) and use mouse to select the Floor Description from the list.
  You can also use the pop-out search box.

* A selection here will automatically populate the Functional Location.

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**Room number**
- Type the room number and use mouse to select the Room from the list.
  You can also use the pop-out search box.

The ROOM Equipment # will populate in the equipment field.

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**Equipment**
The Equipment Number for the ROOM selected will auto-populate.
Make sure the correct equipment is selected for your request.
Click to search for equipment within the room selected, OR THE ROOM ITSELF.
Quick Reference Guide

**Evo Notify**

*Equipment Category References:
F- Facilities Equipment
R- Room
U- Utility Equipment

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Description</th>
<th>Equipment Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>164924</td>
<td>Ladder; Step: 4'</td>
<td>F</td>
</tr>
<tr>
<td>164929</td>
<td>Ladder; Step: 4'</td>
<td>F</td>
</tr>
<tr>
<td>164932</td>
<td>Ladder; Step: 6'</td>
<td>F</td>
</tr>
<tr>
<td>164951</td>
<td>Ladder; Step: 6'</td>
<td>F</td>
</tr>
<tr>
<td>10026670</td>
<td>OFFICE</td>
<td>R</td>
</tr>
</tbody>
</table>

**Maintenance Workcenter**
Selection of equipment above should populate the maintenance work center.

**Building Deputy**
Building Deputy info will autofill. You do not need to add anything here.

**Staff Contact**
Defaults to the person creating the notification. You can change staff contact by clicking the pop out button.

Search by username:
- Partner Function: auto populates “=VU”
- Partner: Type *username*. Enter.
- Click to select the contact.

Search by last name:
- Partner Function: auto populates “=VU”
- Name: *lastname*
- Click to Select the contact.

If Notification Type is O4 (Departmental Costs)
- Enter IO or Grant (F.)
- Enter Percent being paid.

If Notification Type is AF/AFF (Affiliate Work Orders)
- Enter Business Partner number.

Save to Create Notification

** Approving a Notification **

Once the notification has been saved, you will be able to approve it at the top of the screen, if you have the role.
**Notification Quick Search**

You may also use the fields to conduct a quick search using the information you know about a notification.

**Setting Your Search and Filter View**

**Recommendation:**
Create a filter for an area(s) you are responsible for. This will require bringing in filters that are important to you.

**Add Filters you want to see in your View.**
- Type your search into the “Search for Filters” bar and select drilldown box.

**Recommended Filters:**
Building Code, Room, System Status, and User Status
Once filter fields are selected, click Go, then proceed to fill them in with the information you are looking for.

When searching, “=ALLCAPS” may be necessary.

Example: User Status: 

Some fields may require use of the search pop-out.

Example: Building Code
- Start typing the Building Code
- Select from drop-down

Example: User Status
- Type the status you need into the field starting with “=”. 
- OR, select search pop-out
- Type search into User Status Description
  Example: “=Awaiting Approval”
- Hit enter to get the list.
- Select any of the E0004 options
- Select OK
**Saving a Filter/View**

Once you have filled in the fields you need:
- Select Standard* (top left corner)
- Save As

Name the View you created.
Set as Default if you wish.

**Calling/ Switching Views**

The current View name is displayed. A down arrow
**Update View**

*NOTE- When you see the (*) by the view name, this means filter changes have been made, but have not been saved.

For example: Adding a second building (PFSB) to the already saved View.

**STEPS:**
- Add building
- Select Drop-down
- Click Save (to add this information to the already saved view)

*Save As*- will save a NEW View with the added information. It will prompt you to name the view after selecting Save As.

**Manage Views**

"Manage" opens the list of filter variants. The following is visible and changeable.
- **Search bar**: This allows you to search for the name of a variant.
- **Default**: Allows you to select which View you’d like to see when you log in.
- You may also **Delete a view** by clicking the X on the right side.
- Click **OK to save** changes.
- Clicking **Cancel** will take you out of the screen without saving changes.

**Troubleshooting**