DocSoup EMAIL NOTIFICATION

Subject: A DocSoup document has been routed to you (account number and internal ID number)

You have action items in DocSoup.

Instructions to View and Respond to Action Items:

1. To retrieve, click on https://carta.bradley.edu/docsoup/ and log in.
2. Under List Document Packets on the left, click on Action Items.
4. Click on the magnifying glass icon of the document you wish to view.
5. Click on the Document Name/Acct Number (highlighted in red) to open the document.
6. You can then view the document information. Please note any accompanying notes.
7. Print or save the reports to your computer.
8. When ready to route the document packet or to archive it, click on the view Document Packet (highlighted in red) in the left navigation tab. Click on the drop down to the right of your name under Response and select a response. You will then be prompted to click OK to route. If you do not wish to route or desire to change your selection, click on the cancel button.
To access your reports, you will need to log into the MyBU Portal (http://mybu.bradley.edu) with your BUnetID and your regular password. Once in your portal, on the left-hand side you will see a section devoted to DocSoup.

![DocSoup Document Management System]

You have 1 Action Items  

You have 1 Financial Report Alert

DocSoup is a system that makes possible the electronic completion, routing, and approval of University documents. We are introducing this system with monthly budget reports. Additional forms and documents will soon be routeable via this system.

If your reports are ready to be viewed, the system will indicate you have "Action Items". Click on Alert link (as circled below) to see a description of the items available.

![DocSoup Document Management System]

You have 1 Action Items

You have 1 Financial Report Alert

<table>
<thead>
<tr>
<th>Document Description</th>
<th>Name</th>
<th>Status</th>
<th>Submit</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fin Report</td>
<td>Submitted</td>
<td>2009-08-27</td>
<td>1753-01-01</td>
<td></td>
</tr>
</tbody>
</table>

DocSoup is a system that makes possible the electronic completion, routing, and approval of University documents. We are introducing this system with monthly budget reports. Additional forms and documents will soon be routeable via this system.

To access the DocSoup Website, click on the DocSoup icon.
Once in DocSoup, you will see a Navigation tab and list on the left-hand side. A Document Packet is the sum of all information associated with your report. The packet will include the report, routing information and any notes associated with the report.

Click on the Action Item List to see the list of new Document Packets.

The list of Document Packets available for viewing will be listed in the Action Item List.

Click on the View icon to see the information for the Document Packet. Note: The Document name indicates for which account the packet has been created.

To view the report, click on the Attachment link.

The report will open in another window. At this time, print or save your report as desired.
Once the report and all associated notes have been reviewed, you must acknowledge receipt of the report in the Routing Section. Select ‘Yes’ in the Response column and click on the ‘Save’ Icon.

This step is necessary to remove this action item from the current listing. The Document Packet will then transfer over to the Action Item History section where you can view it anytime later.