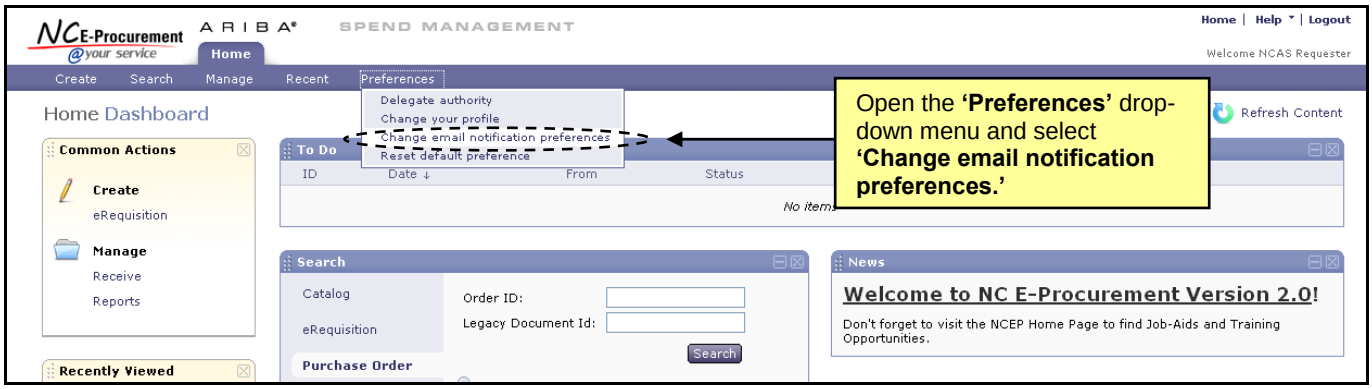
Edit Email Notification Preferences Process Guide

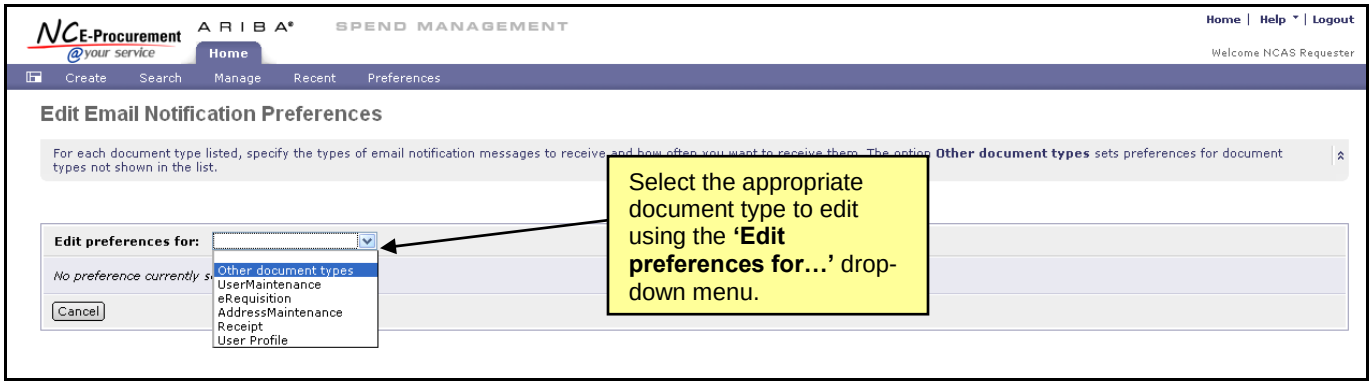
Notifications are email messages that NC E-Procurement automatically sends to preparers, requesters, approvers, and administrators to keep them informed of the progress and status of active approvables. Every notification message describes the purpose of the notification, and most include a link to the relevant request or document in NC E-Procurement so that users can quickly take action or access information. Users may edit the frequency and subject matter of their email notifications.

1. Click **'Preferences'** on the Menu Bar and select **'Change email notification preferences.'**



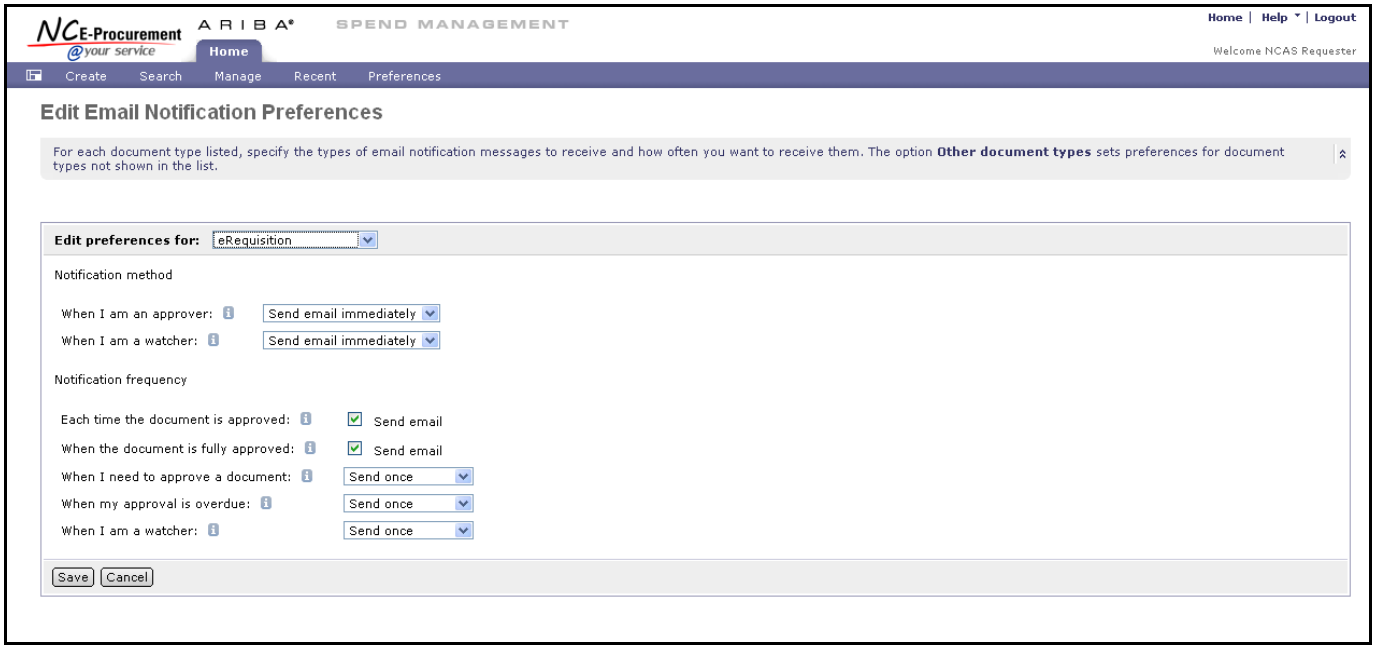
2. Select the appropriate document type to edit using the **'Edit preferences for…'** drop-down menu.

Note: Email notification preferences must be set independently for each document type. The six options in the drop-down menu are **Other document types, UserMaintenance, eRequisition, AddressMaintenance**, **Receipt,** and **User Profile.**



3. The **'Edit Email Notification Preferences'** page will automatically appear when a document type is selected. In this example, **'eRequisition'** has been chosen from the drop-down menu.

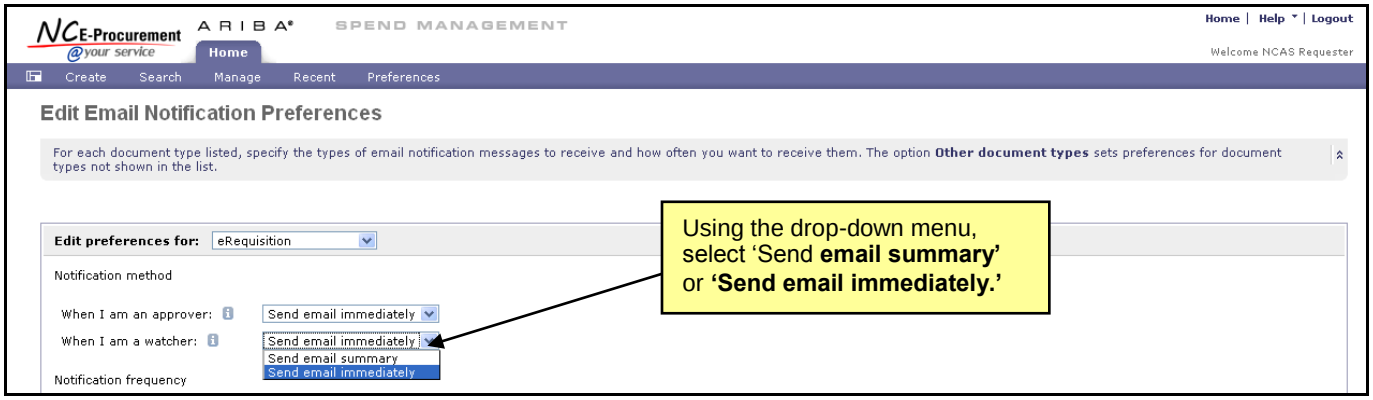
Note: The same screen choices appear for all document types.



4. **'Notification method'** allows the user to select whether to receive separate email notifications immediately for each approvable (i.e., **'Send email** immediately') or to receive all email notifications for the day as one daily email summary (i.e., **'Send email summary'**).

   a. **'When I am an approver'** specifies the frequency at which the user wishes to receive email notifications when the user is a required approver in an approval flow.

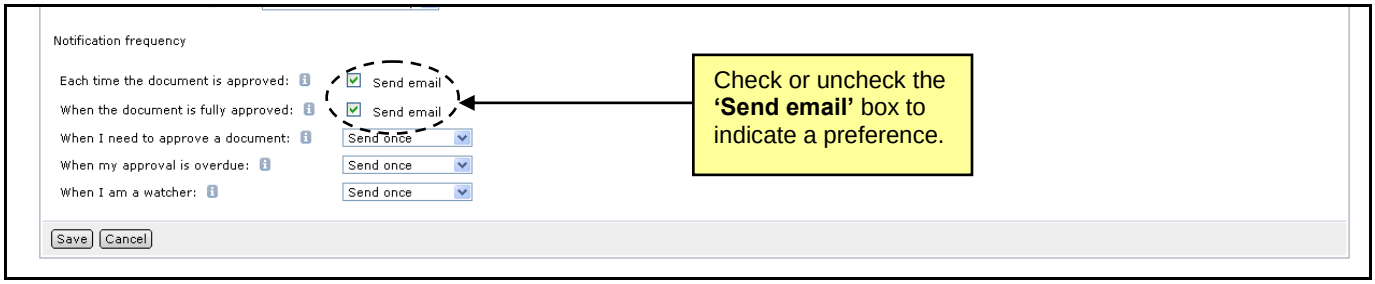
   b. **'When I am a watcher'** specifies the frequency at which the user wishes to receive email notifications when the user is a watcher in an approval flow.



5. **'Notification frequency'** allows the user to select when and how often they receive email notifications.

   a. **'Each time the document is approved'** – when the user is a preparer or watcher of an approvable, checking this box specifies whether the user wants to be notified each time an approver approves the document.

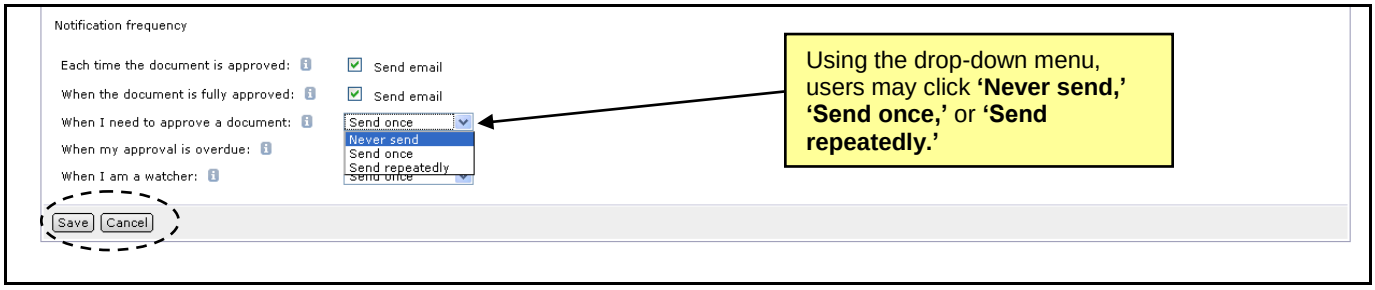
   b. **'When the document is fully approved'** – when the user is a preparer or watcher of an approvable, checking this box specifies whether the user wants to be notified when the document is fully approved.



   c. **'When I need to approve a document'** – specifies how often the user wants to be notified when a document is awaiting his/her approval. The user can choose to never receive email notifications, receive one notification, or to receive notifications repeatedly on a daily basis.

   d. **'When my approval is overdue'** – specifies how often the user wants to be notified when his/her approval is overdue. The user can choose to never receive email notifications, receive one notification, or to receive notifications repeatedly on a daily basis.

   e. **'When I am a watcher'** – when the user is a watcher, specifies how often the user wants to receive each watcher notification. The user can choose to never receive email notifications, receive one notification, or to receive notifications repeatedly on a daily basis.



6. Click **'Save'** to save the updated preferences.

7. Click **'Cancel'** to return to the NC E-Procurement Dashboard without changing the preferences.