

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.'

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@your service Home					Welcome NCAS Requester
Create Search Manage	Recent Preferences			_	_
Home Dashboard	Delegate a Change yo Change er	authority our profile mail notification preferences	•	Open the ' Preferences ' drop- down menu and select	C Refresh Content
	ID Date ↓	From	Status	proforences '	
eRequisition			No ite	m preferences.	
Manage	i Search			ii News	
Reports	Catalog	Order ID:		Welcome to NC E-Procurement	Version 2.0!
	eRequisition	Legacy Document Id:		Don't forget to visit the NCEP Home Page to find Job-Ai Opportunities.	ds and Training
Recently Viewed	Purchase Order		Search		

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**.

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<i>@your service</i> Home		Welcome NCAS Requester
🕞 Create Search Manage Recent Preferences		
Edit Email Notification Preferences		
For each document type listed, specify the types of email notification messages to receive types not shown in the list. Edit preferences for: No preference currently s UserMaintenance eRequisition AddressMaintenance Receipt	Select the appropriate document type to edit using the 'Edit preferences for' drop- down menu.	Other document types sets preferences for document
User Prome		



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.

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@your service Home		Welcome NCAS Requester
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Edit Email Notification Prefere	nces	
For each document type listed, specify the types not shown in the list.	bes of email notification messages to receive and how often you want to receive them. The option Other document types sets preferences	; for document 🏾 🎗
Provinces		
Edit preferences for: eRequisition		
Notification method		
When I am an approver: 🕕 Send ema	l immediately 🔽	
When I am a watcher: 🚯 Send ema	i immediately 💌	
Notification frequency		
Each time the document is approved: 🔋	✓ Send email	
When the document is fully approved: 🔋	✓ Send email	
When I need to approve a document: 🔋	Send once	
When my approval is overdue: 👔	Send once 💌	
When I am a watcher: 🔋	Send once	
Save Cancel		

- '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.

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Edit Email Notification Preferences		
For each document type listed, specify the types of email notification messages to receive and how types not shown in the list.	often you want to receive them. The option Other document	types sets preferences for document
Edit preferences for: eRequisition	Using the drop-down menu, select 'Send email summary' or 'Send email immediately.'	
When I am an approver: Send email immediately When I am a watcher: Send email immediately Send email summary Send email immediately Notification frequency Send email immediately		



- 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.

Notification frequency Each time the document is approved: When the document is fully approved: When I need to approve a document: When my approval is overdue: Send once V	Check or uncheck the 'Send email' box to indicate a preference.
When I am a watcher: Save Cancel	

- 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.

Each time the document is approved: When the document is fully approved: When I need to approve a document: When my approval is overdue: When I am a watcher: 1	Send email Send once Send repeatedly Send repeatedly	Using the drop-down menu, users may click 'Never send,' 'Send once,' or 'Send repeatedly.'	
Save) Cancel			

- 6. Click 'Save' to save the updated preferences.
- 7. Click 'Cancel' to return to the NC E-Procurement Dashboard without changing the preferences.