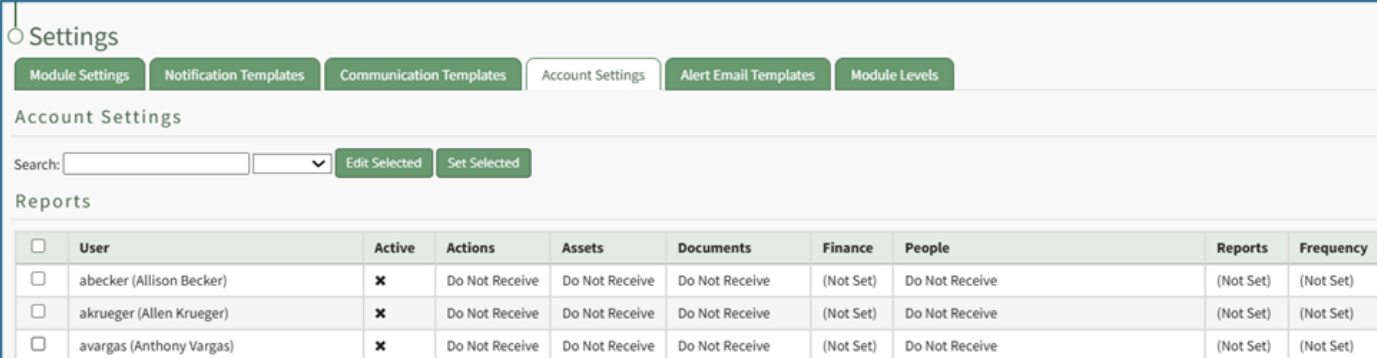


Documents Module Email Alert Summary

Users can enable and set their own notifications preferences for system emails on the Notifications Tab of the My Accounts Page in the Accounts Module.

How To: Edit Email Report / Alert Notification Settings for Existing Accounts

To edit email report / alert settings for existing accounts, go to the Account Settings Tab on the Settings Page of the Communications Module.



Settings

Module Settings Notification Templates Communication Templates Account Settings Alert Email Templates Module Levels

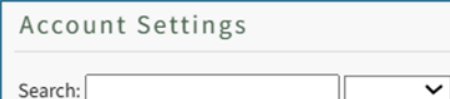
Account Settings

Search:

Reports

<input type="checkbox"/>	User	Active	Actions	Assets	Documents	Finance	People	Reports	Frequency
<input type="checkbox"/>	abecker (Allison Becker)	✘	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)
<input type="checkbox"/>	akrueger (Allen Krueger)	✘	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)
<input type="checkbox"/>	avargas (Anthony Vargas)	✘	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)

Select the users whose email report/ alerts notification settings you wish to edit.



Account Settings

Search:

The Search textbox simplifies the search for specific users. The dropdown menu allows you to select between users' current statuses for Reports/Alerts receipt. If you wish to edit all user accounts with the same new settings, select the checkbox in the title row of the table to select all users in the table. Selecting a user in one table automatically selects them in the other.

Select the "Edit Selected" button, opening the Update Account Settings Modal.

Update Account Settings

Reports

Status:

Actions:

Assets:

Documents:

Finance:

People:

Reports:

Email Report Frequency

Daily Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Weekly Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Monthly

* Months that do not have these days will instead be sent on the last day of the month

Alerts

Status:

Accounts:

Actions:

Assets:

Dispatch:

Documents:

Finance:

Forms:

Meetings:

People:

Make the desired changes for both email reports/alerts that you would like to apply to the pre-selected users.

Select "Save" for the notification preferences to be altered. Click "Cancel" to return to the Account Settings Tab on the Settings Page with any user accounts being impacted.

Documents Module Email Alerts Summary

Email Alert	Digestible
Acknowledgement Reminder	Can be sent via digest
Acknowledgement Required	Can be sent via digest
Approval Required	Can be sent via digest
Comment Added	Can be sent via digest
Continued Suitability Review	Can be sent via digest
Continued Suitability Review Warning	Can be sent via digest
Notification of New Revision	Can be sent via digest

Administrators can update the system default settings (including whether they are sent in real-time or digestible) for alert emails on the Settings Page of the Communications Module.

Revision #3

Created 2025-12-04 17:57:11 UTC by Mitzi Orkus

Updated 2026-01-25 19:58:55 UTC by Mitzi Orkus