Notifications/Email Preferences in Your Action List

Overview

You can set preferences for how often you receive eDoc notifications via email. The Email Notification Preferences section allows you to select both how and when you receive reminder emails on items sent to your Action List.

Steps

Setting Preferences for Email Notification

1. Login to one.iu.edu.
2. In the Search box, type “action list” and press ENTER.
3. Click the Action List (Kuali Rice) task icon.
   The action list toolbar will display at the top.

4. To change your email notification preferences, click preferences.
5. Scroll down to see the Email Notification Preferences section.

6. In the Email Notifications Preferences area, you can select how and when you want to receive reminder emails on items sent to your Action List. You can also select whether or not to receive emails as the Primary Delegate, as the Secondary Delegate, and you can set the Default Email Notification preference to: None, Daily, Weekly, or Immediate. If you are not a Primary or Secondary Delegate, then it’s best to leave those fields unchecked.
   - You can override the Default Email Notification preference and the different frequencies setting (Immediate, Daily, etc.) to receive notifications based on the type of document (for example SIS SR Drop Course Document, SIS SR Add Course Document, SIS SR Grade Change Document, etc.)
   - You can also turn notifications on or off based on the request type (Complete, Approve, Acknowledge, or FYI) when Immediate is set as the Default Email Notification.
Email Notification settings

The options selected for the Default Email Notification and Document Type Notification work together to determine when a particular action item is included in the immediate, daily, or weekly email reminders.

If you select a Default Email Notification and do not select a Document Type Notification, the emails will be sent (or not sent), based on the default selection.

<table>
<thead>
<tr>
<th>Document Type Notifications</th>
<th>Document Type</th>
<th>Notification Preference</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

However, if a Document Type Notification is set and it is different from the Default Email Notification, the Document Type Notification will take precedence. This allows you to customize email reminders by document types. For example:

- If Immediate is set as the Default Email Notification, but a document type rule is set to None for the SIS SR Add Course eDoc; then no email notifications are sent for that specific document.
- If Daily is the Default Email Notification, and a document type rule is added to receive Weekly notifications for the SIS SR Grade Change eDoc; then for that document, the only action request email received is a Weekly reminder.
- If None is set as the Default Email Notification, and a document type rule is added to receive Daily notifications for SIS SR Drop Course eDoc; then for that document, the only action request email received is a Daily reminder.

**Request Type Option:**

In addition, when the Default Email Notification is set to Immediate, you can use the Send Email Notifications For option to decide whether or not to receive notifications by request type.

All four of the request types (Complete, Approve, Acknowledge, and FYI) are already selected/checked by default in your Workflow Preferences screen.

When an action request is received, and the preference is set to receive an immediate reminder, the system checks to ensure that the request type checkbox is turned-on (selected/checked) before an email is sent.

This allows these checkboxes to be used as a switch to ‘turn-on’ or ‘turn-off’ the Immediate email reminders for a given request type. For example:

- To stop the receipt of Acknowledgement emails when your preference is set to receive Immediate reminders, you need to deselect/unchecked the Acknowledge checkbox.
- Click save to save any changes made to Email Notification Preferences.
Notifications/Email Preferences in Your Action List

Adding or Deleting Document Type Notifications

1. In One.IU, go to your Action List (see instructions above).
2. In the action list toolbar, click preferences.
3. Scroll down to the Email Notification Preferences section.

<table>
<thead>
<tr>
<th>Document Type Notifications</th>
<th>Document Type</th>
<th>Notification Preference</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

4. In the Document Type Notifications area:
   a. Click the look-up button to select a Document Type (for example SIS SR Drop Course Document, SIS SR Add Course Document, SIS SR Grade Change Document, etc.) and click return value.
   b. Choose a Notification Preference (None, Daily, Weekly or Immediate).
   c. Click add.
   d. Repeat steps 4a through 4c for each Document Type you want to add.
5. To delete an existing Document Type Notification, click delete next to the preference you want to remove.
6. To change an existing Document Type Notification Preference from the Document Type Notifications area, just add a new rule for that document-type and it will replace the old one.
7. Click save.

Setting Email Notifications by Request Type

1. In One.IU, go to your Action List (see instructions above).
2. In the action list toolbar, click preferences.
3. Scroll down to the **Email Notification Preferences** section.
4. In the **Send Email Notifications For** area, select your preferences.

![Image of the Email Notification Preferences section]

- a. To receive email notifications for a specific Request type (**Complete**, **Approve**, **Acknowledge**, or **FYI**), be sure the checkbox is selected/checked.
- b. To stop email notifications for a specific Request type, be sure the checkbox is deselected/unchecked.

5. Click **save**.

The following table explains how the preferences work together:

<table>
<thead>
<tr>
<th>If the Default Email Notification is:</th>
<th>AND Document Type Preference is:</th>
<th>You receive:</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Immediate</td>
<td>Immediate email for that Document-Type, if a given Request-Type (<strong>Approve</strong>, <strong>FYI</strong>) is checked</td>
</tr>
<tr>
<td></td>
<td>Daily or Weekly</td>
<td>Daily email or Weekly email</td>
</tr>
<tr>
<td>Immediate</td>
<td>Immediate or No preference</td>
<td>Immediate email for that Document-Type, if a given Request-Type (<strong>Approve</strong>, <strong>FYI</strong>) is checked</td>
</tr>
<tr>
<td></td>
<td>Daily or Weekly</td>
<td>Daily email or Weekly email</td>
</tr>
<tr>
<td>Daily</td>
<td>Immediate</td>
<td>Immediate email for that Document-Type, if a given Request-Type (<strong>Approve</strong>, <strong>FYI</strong>) is checked, and again as Daily email</td>
</tr>
</tbody>
</table>
## Notifications/Email Preferences in Your Action List

<table>
<thead>
<tr>
<th>Daily or No preference</th>
<th>Daily email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly</td>
<td>Weekly email</td>
</tr>
<tr>
<td><strong>Weekly</strong></td>
<td></td>
</tr>
<tr>
<td>Immediate</td>
<td>Immediate email for that Document-Type, if a given Request-Type (Approve, FYI...), is checked, and again as Weekly email</td>
</tr>
<tr>
<td>Daily</td>
<td>Daily email and again as Weekly email</td>
</tr>
<tr>
<td>Weekly or No preference</td>
<td>Weekly email</td>
</tr>
<tr>
<td>‘None’ specified in either field (e.g., None &amp; No preference, Immediate &amp; None)</td>
<td>No email</td>
</tr>
</tbody>
</table>