



Creating a Personal Notification Summary



About Summary Notifications

Depending on your role and involvement in a project, you can potentially receive a large quantity of system generated notifications from e-Builder throughout the day. The summary notifications feature gives you the option to combine all of your system notifications and receive one daily summary, thus reducing the volume of emails you receive.

These notifications can be set up at the account level and managed for any number of users or roles. Likewise, individuals can set up notifications for themselves. You are able to choose which modules to include in each notification summary as well as the specific components of the module, such as cost approvals and opened or closed forms, for example.

The following instructions are for creating a Personal Notification Summary. If you have any questions or need assistance, please contact training at training@nmppsfa.org.

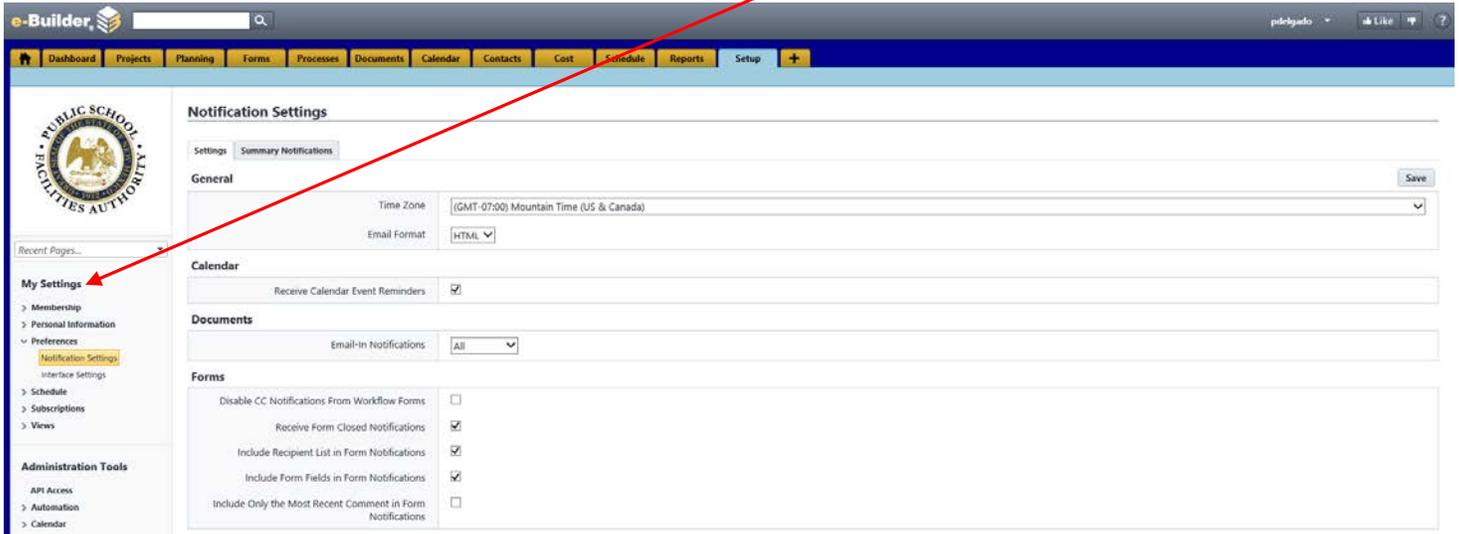
Thank you!

Create Personal Summary Notifications in e-Builder

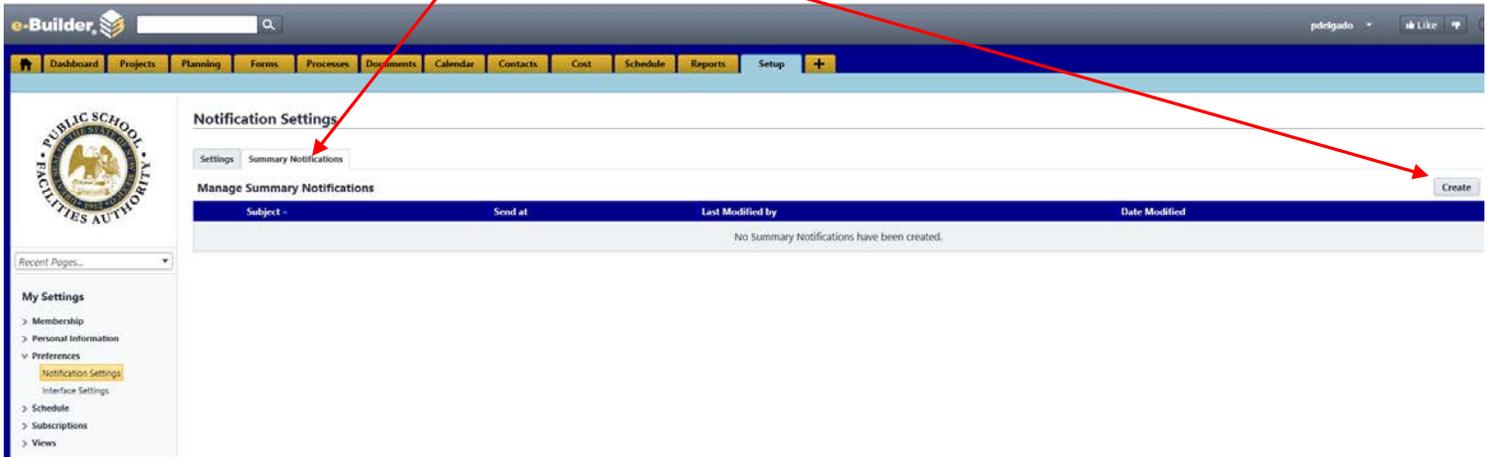
You're able to create summary notifications for yourself, but account administrators are also able to create these notifications on behalf of the members of the organization.

To create personal summary notifications:

1. Go to the Summary Notifications page located in My Settings.



2. Click the **Summary Notifications** tab. Click **Create**.



REMEMBER: If there is a red * the field is required.

3. Enter a subject for you summary in the **Subject** field

The screenshot shows the 'Create Summary Notification' form in the e-Builder application. The 'Subject' field is empty. The 'Module(s)' field is empty. The 'Send Daily Summary at' field is set to 2:30 PM. There are 'Save' and 'Cancel' buttons at the top right and bottom right.

4. Click in the **Module(s)** field to choose the modules from which to summarize notifications. A list of specific notifications for the selected module(s) appears in a table below.

The screenshot shows the 'Create Summary Notification' form in the e-Builder application. The 'Subject' field is 'Test Notifications'. The 'Module(s)' field is open, showing a list of modules: Add all modules, Calendar, Cost, Forms, Processes, Project Issues, and Schedule. There are 'Save' and 'Cancel' buttons at the top right.

5. Select the check box next to the specific notifications you wish to include in the summary. Click Save

The screenshot shows the 'Create Summary Notification' form in the e-Builder application. The 'Subject' field is 'Test Notifications'. The 'Module(s)' field is set to 'Forms' and 'Processes'. The 'Send Daily Summary at' field is set to 2:30 PM. A table of notifications is displayed with checkboxes for selection. There are 'Save' and 'Cancel' buttons at the top right and bottom right.

Forms Notifications		
Action Req'd - Form Placed in Court	A form is in your court	<input type="checkbox"/>
Comment Made on Form	A comment has been added to a form	<input type="checkbox"/>
Form Closed	A form has been closed	<input type="checkbox"/>
Form Forwarded	A form you have been copied on has been forwarded to another user	<input type="checkbox"/>
Form Opened	A form has been reopened	<input type="checkbox"/>
Form Replied	A form you have been copied on has been replied to	<input type="checkbox"/>
FYI - Form Filled Out	You have been copied on a form that has been filled out	<input type="checkbox"/>
FYI - Form Updated	A form has been updated	<input type="checkbox"/>

Processes Notifications		
Action Req'd - Actor	A process instance is in your court	<input type="checkbox"/>
Action Req'd - Delegated	A user has delegated full authority of a process to you	<input type="checkbox"/>
Action Req'd - Delegation Declined	A user has declined to act on a process instance	<input type="checkbox"/>
Action Req'd - Forwarded	A user has forwarded a process instance to you	<input type="checkbox"/>
Action Req'd - Replied	A user has replied to a process instance	<input type="checkbox"/>
Action Req'd - Spawn Error	An error occurred when spawning a process	<input type="checkbox"/>
Action Req'd - Workflow Error	An error occurred while moving a process between steps	<input type="checkbox"/>
Comment Responded	An external user has responded to your request for comment	<input type="checkbox"/>
FYI - Accept Notice	A user has accepted ownership of a process instance	<input type="checkbox"/>
FYI - Action Taken	A user has taken action on a step	<input type="checkbox"/>
FYI - Actor has been Removed	Actor(s) have been removed from a process instance, additional information is required to complete the action	<input type="checkbox"/>
FYI - Comment Added	A comment has been added to a process	<input type="checkbox"/>
FYI - Step Notifications	A process instance has moved between steps	<input type="checkbox"/>

6. On the settings tab, disable all notification preferences under the Forms field. Click **Save**

The screenshot shows the 'Notification Settings' page in the e-Builder application. The page is titled 'Notification Settings' and has tabs for 'Settings' and 'Summary Notifications'. The 'Settings' tab is active. The page is divided into sections: 'General', 'Calendar', 'Documents', and 'Forms'. The 'Forms' section contains five checkboxes, all of which are unchecked. A red arrow points to the first checkbox, 'Disable CC Notifications From Workflow Forms'. A 'Save' button is located in the top right corner of the 'General' section. The left sidebar shows a navigation menu with 'Notification Settings' highlighted. The top navigation bar includes 'Dashboard', 'Projects', 'Planning', 'Forms', 'Processes', 'Documents', 'Calendar', 'Contacts', 'Cost', 'Schedule', 'Reports', and 'Setup'.

Your Personal Notification Summary can be set up to receive multiple times a day, just follow steps 1-5 and select the time you wish to receive your summary email.