

Notification Preferences

Requirements

This user guide is for anyone on Claromentis 8.2+

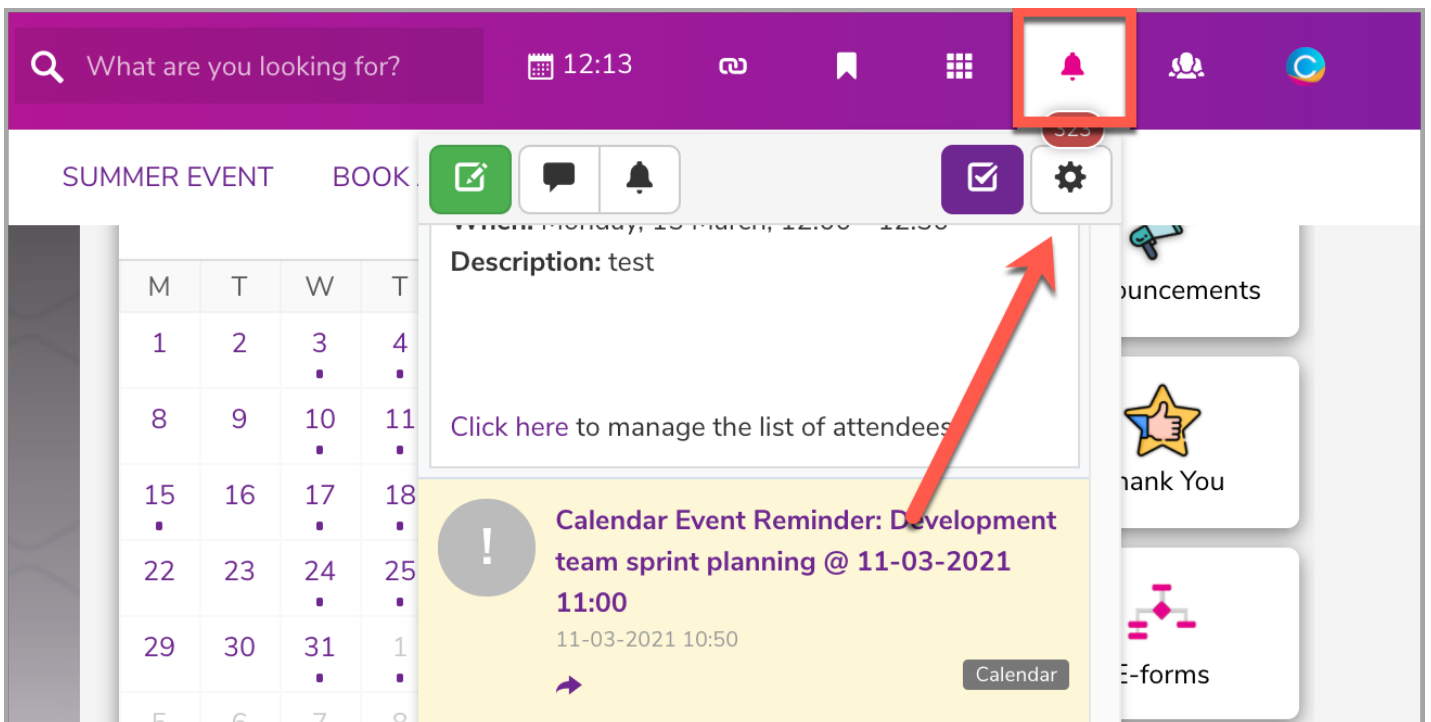
Introduction

This user guide will take you through setting up your notification preferences in the most effective way for you.

The following information is outlined in the video above.

How to configure your notification settings

You can easily go to your notification settings by clicking on the settings cog from your inbox summary list:



From here, you can choose the default notification for any of the applications to follow. In other words, the 'Use default' option will correspond to the above default settings.

Communication / Notification Preferences

Compose [Settings] [Close]

Messages [bell icon]

Notifications [bell icon]

All types [dropdown] All words [dropdown] [Reset]

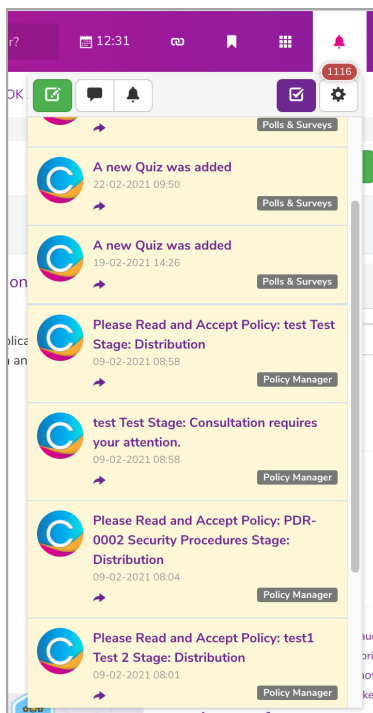
Default notification method ☐ None ☒ In-system ☒ Push ☐ Email

Auto delete read notifications after 3 months [dropdown]

Application	Preference	Notification method	E-mail options	Auto delete read notifications after
Admin	Use default [dropdown] Custom [dropdown]			Default [dropdown]
Audit Manager	Use default [dropdown]			Default [dropdown]
Badges	Use default [dropdown]			Default [dropdown]
Blog	Use default [dropdown]			Default [dropdown]
Calendar	Use default [dropdown]			Default [dropdown]
Comments	Use default [dropdown]			Default [dropdown]
Discuss	Use default [dropdown]			Default [dropdown]

These are three notification methods to select from.

- **In-System notification:** System will display a notification list with the click of the bell icon.



- **Push notification** (on mobile): Please click here for more information on how to configure push notifications.
- **Email notification:** Emails will be sent to the email address that has been specified within the user's profile.

You can also choose how long your messages are kept by default which ranges from 1 week up to 1 year or never deleted.

Communication / Notification Preferences

Compose [Settings] [Close]

Messages Notifications

All types [] All words [] [Search] Reset

Default notification method ☐ None ☒ In-system ☒ Push ☐ Email

Auto delete read notifications after 3 months

Application	Preference	Notification method	E-mail options	Auto delete read notifications after
Admin	Use default			
Audit Manager	Use default			
Badges	Use default			
Blog	Use default			
Calendar	Use default			Default
Comments	Use default			Default
Discuss	Use default			Default

Auto delete read notifications after dropdown menu:

- ✓ Default
- Never delete
- 1 week
- 1 month
- 3 months
- 6 months
- 1 year

If you want to customise your notification preference for each application, you can do so by choosing the 'Custom' option.

Blog	Use default ✓ Custom	<input type="checkbox"/> None <input checked="" type="checkbox"/> In-system <input type="checkbox"/> Push <input type="checkbox"/> Email	Default
Calendar	Custom	<input type="checkbox"/> None <input checked="" type="checkbox"/> In-system <input type="checkbox"/> Push <input checked="" type="checkbox"/> Email	Send Instantly
Comments	Use default		Default
Discuss	Custom	<input type="checkbox"/> None <input type="checkbox"/> In-system <input type="checkbox"/> Push <input checked="" type="checkbox"/> Email	Send Instantly

If you look at the two examples below, InfoCapture emails, which may need your approval, are set up as an email notification and to be sent instantly & never deleted.

On the other hand, Knowledge base is set for an in-system notification and can be deleted.

Learning is simply set to follow the default notification method.

Infocapture	Custom	<input type="checkbox"/> None <input type="checkbox"/> In-system <input type="checkbox"/> Push <input checked="" type="checkbox"/> Email	Send Instantly	Never delete
Knowledge Base	Custom	<input type="checkbox"/> None <input checked="" type="checkbox"/> In-system <input type="checkbox"/> Push <input type="checkbox"/> Email		1 week
Learning	Use default			Default

Lastly, you can decide how often notifications are triggered by selecting the following options:

Discuss	Custom	<input type="checkbox"/> None <input type="checkbox"/> In-system <input type="checkbox"/> Push <input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Send Instantly <input type="checkbox"/> Daily digest <input type="checkbox"/> Weekly digest <input type="checkbox"/> Monthly digest	Default
Documents	Use default			Default
E-Learning	Use default			Default
Events	Custom	<input type="checkbox"/> None <input checked="" type="checkbox"/> In-system <input type="checkbox"/> Push <input checked="" type="checkbox"/> Email	Send Instantly	Default
Expenses	Use default			Default

- **Send instantly:** Notifications will be immediately triggered when needed.

- **Daily Digest:** Notifications will be pooled daily and sent as a digest email.
- **Weekly Digest:** Notifications will be pooled weekly and sent as a digest email.
- **Monthly Digest:** Notifications will be pooled monthly and sent as a digest email.

Reminder: It is useful to set things up how you would like them early on to ensure nothing important is missed and you're not frequently bothered by generic notifications.

Last modified on 30 November 2023 by Hannah Door

Created on 9 May 2018 by Mhairi Hutton

Tags: communication, email, notification, preferences