

### Overview

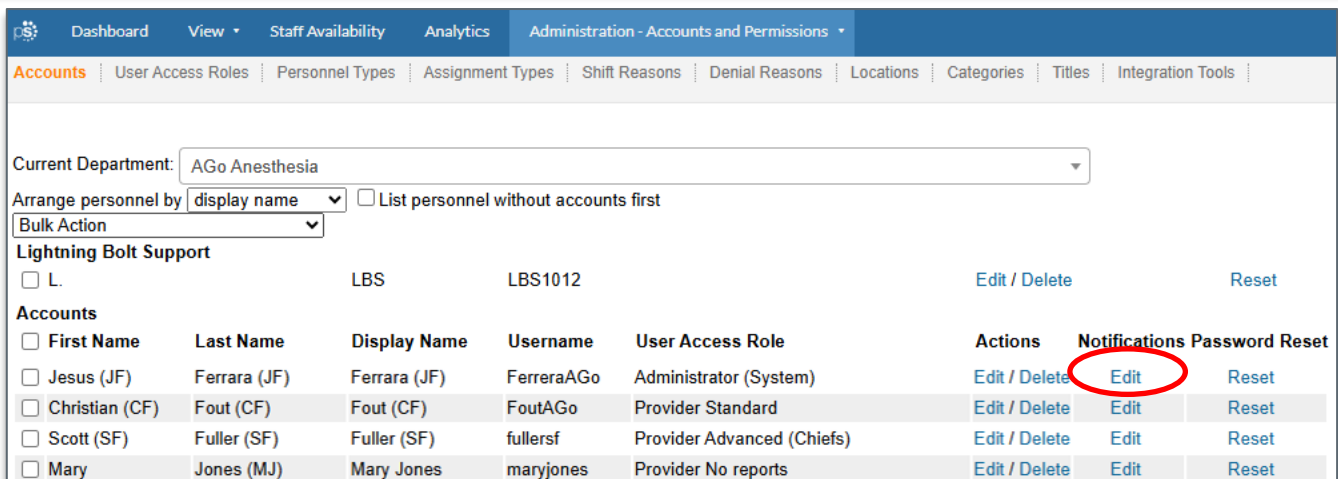
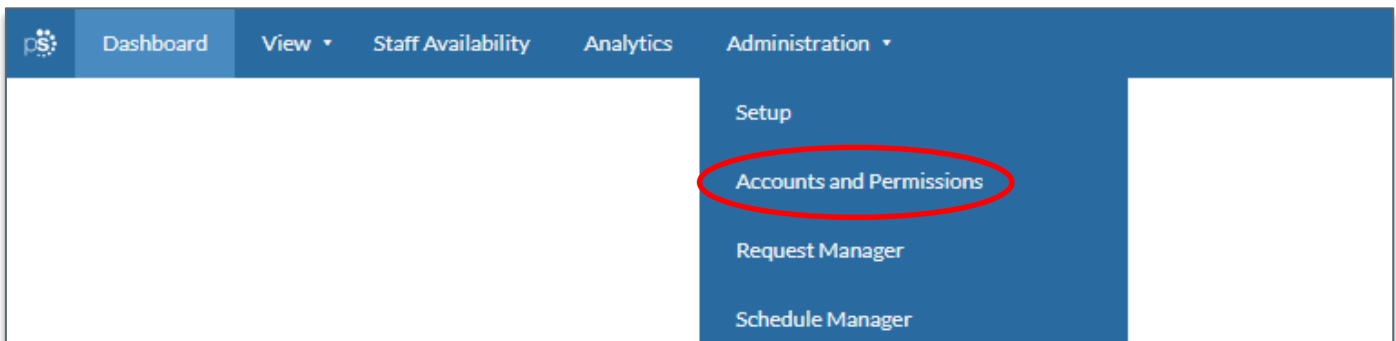
Custom notifications is a feature that gives administrators the ability to create personalized, rule-based notification settings for their users. This enhancement allows notifications to be filtered by delivery method, recipient, timing, status, and type—ensuring alerts are relevant and timely. If no custom notification rules are configured, the system will continue to use the default settings defined by User Access Roles (UAR), maintaining consistent behavior for users who do not opt into customization.

**Note:** Users will receive notifications based on either User Access Roles (UAR) or custom notification Rules—not both. If no custom rules are configured, the system will default to UAR-based notifications. However, if **custom rules are used**, only notifications that match those rules will be sent. Any notifications that do **not** meet the criteria of a custom rule will **not** be delivered

### Configure a New Notification Rule

As an admin, you will be able to navigate to your users' custom notifications via the web.

1. Expand the **Administration** dropdown.
2. Select **Accounts and Permissions**.
3. Select **Edit** of the user under the **Notifications** column.

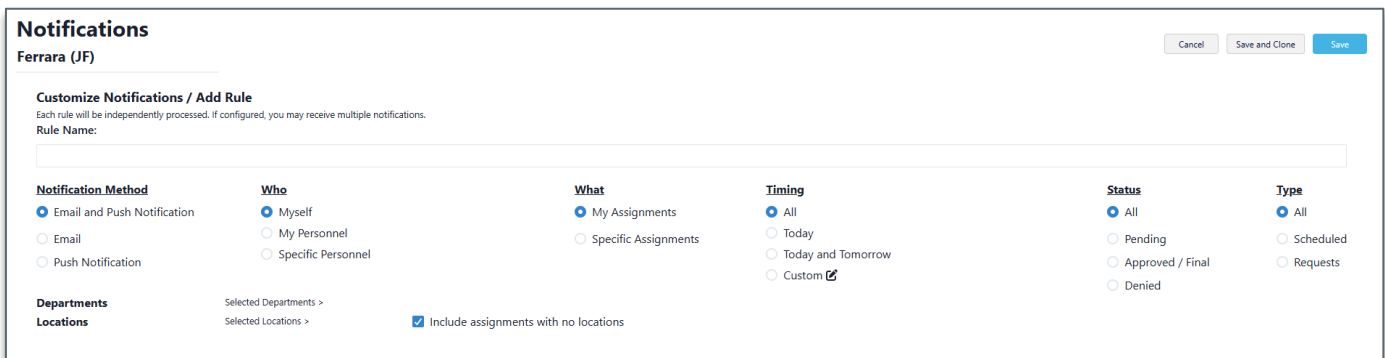


## Configure a New Notification Rule *continued*

- Click **Edit** under **Notification Email(s)** to add one or more notification email.
  - For any notifications that the user will receive via email.
- Select **Add Rule**.



- Add a **Rule Name**.
  - Naming convention should be clear and indicate the purpose of the rule.
  - Example: *Myself: Push Notifications – Everything* or *Myself: Email – Denied*



**Notifications**  
Ferrara (JF)

Cancel Save and Clone Save

**Customize Notifications / Add Rule**  
Each rule will be independently processed. If configured, you may receive multiple notifications.  
Rule Name:

**Notification Method**  
 Email and Push Notification  
 Email  
 Push Notification

**Who**  
 Myself  
 My Personnel  
 Specific Personnel

**What**  
 My Assignments  
 Specific Assignments

**Timing**  
 All  
 Today  
 Today and Tomorrow  
 Custom

**Status**  
 All  
 Pending  
 Approved / Final  
 Denied

**Type**  
 All  
 Scheduled  
 Requests

**Departments**  
Selected Departments >

**Locations**  
Selected Locations >  Include assignments with no locations

- Update the filters to meet the needs of the notification rule.
  - Notification Method:** How the user will receive the notification.
    - Options are: Email and Push Notification, Email only, and Push Notification only.
  - Who\*:** Who the notification rule applies for.
    - Options are: Myself, My Personnel, Specific Personnel
    - Specific Personnel* allows for you to select which individuals that this rule will apply for.
  - What\*:** Which assignments the notification rule applies for.
    - Options are: My assignments and Specific Assignments
    - Specific Assignments* allows for you to select which assignments that this rule will apply for.
  - Timing:** Based on the scheduled date of the event, within which changes will trigger notifications.
    - Options are: All, Today, Today and Tomorrow (next 48 hours), or Custom (allows for greater timeframes).
    - Example: Filter selected is *Today and Tomorrow* – the admin makes a change today for tomorrow, the system **will** send a notification. However, if the admin makes a change today for next week, the system **will not** send a notification.
  - Status:** The type of change status the user wants to receive notification for.
    - Options are: All, Pending, Approved/Final, or Denied.
  - Type\*:** The type of event for the user.
    - Options are: All, Scheduled, Requests.

*\*Options displayed under this filter are dependent on the user's permissions.*

## Configure a New Notification Rule *continued*

The following section allows you to apply custom filters based on department, locations and – if selected under the **Who** section – individual personnel.

- **Departments:** Select which department(s) the notification rule will apply for.
- **Locations:** Select which location(s) the notification rule will apply for.
- **Personnel:** Select which individual users for whom the rule will apply.
- **Assignments:** Select which assignments that the rule will apply for.
  - Assignments will appear based on department filters selected.
  - Assignments tied to the same ID will be selected together
- **Include assignments with no locations:** will include any assignments that do not have a location.

The screenshot shows a configuration form for a notification rule. It is organized into four columns: **Notification Method**, **Who**, **What**, and **Timing**. Below these are filter sections for **Departments**, **Locations**, **Personnel**, and **Assignments**. A red box highlights the filter sections. In the **Who** section, 'Specific Personnel' is selected. In the **What** section, 'Specific Assignments' is selected. In the **Timing** section, 'All' is selected. In the **Who** filter section, 'Include assignments with no locations' is checked. A search dropdown for personnel is open, showing 'Connor Williams' selected.

*\*Options displayed under these filters are dependent on the user's permissions.*

8. Click **Save** when the rule is complete.
  - **Additional options:**
    - **Save and clone:** Allows you to save the rule and duplicate the rule to then adjust for other types of notifications.
    - **Cancel:** Exit without creating the notification rule.

## Edit a Notification Rule

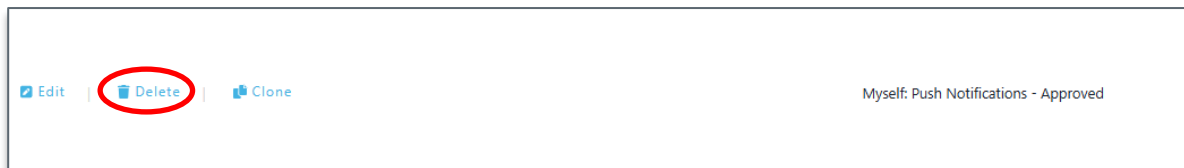
1. Locate the rule and select **Edit**.



2. Make changes to the notification rule.
3. Select **Save** to save those changes.

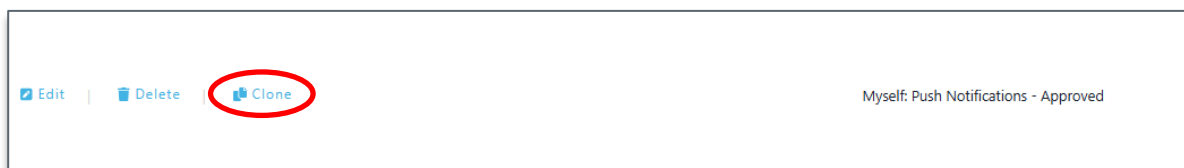
## Delete a Notification Rule

1. Locate the rule and select **Delete**.



## Clone a Notification Rule

1. Locate the rule and select **Clone**.



2. Update the name of the notification rule.
3. Update the filters.
4. Select **Save**.

## FAQ



### **Why is a user receiving notifications for a department or location that wasn't included in their rules?**

When a user is given new notifications for a department or location by an admin, the system automatically updates their existing custom notifications rules to include the department or location – *even if those rules were previously limited to specific ones*. This is a safeguard to ensure the user does not miss any important updates related to their new access. If the user does not want to receive notifications for that department or location, the user or admin can manually edit their rules to remove it.



### **Why is a user not receiving notifications as expected?**

Review the user's custom notification rules. If there is no rule that matches the type of notification you are expecting, the system will not send it. Make sure a rule exists that covers the specific criteria for that notification.



### **Can a user manage their own notification rules or does an admin have to do it?**

A user cannot manage their own custom notifications rules, it must be done by an admin.



### **A user did not receive a notification, but there is a rule for it. Why?**

Have the user confirm that they did not miss the notification, check that the email did not go to their junk/spam folder. If the user is sure the notification was not missed and a rule does exist, reach out to Support for further assistance.



### **If a user no longer wants to use custom notification rules, can we stop them?**

Absolutely! If a user prefers to no longer use their custom notification rules, simply delete all their rules. The system will then default back to the user's UAR permissions for notifications.



### **Is a user required to use custom notifications?**

No, using custom notifications is optional. By default, the system will follow the user's UAR permissions for sending notifications. Custom notification rules only apply if you choose to configure them.



### **Why is it marking multiple assignments when I only selected one?**

If the assignment you selected shares an Assignment ID with other assignments, the system will automatically include all linked assignments. This ensures that notifications are sent consistently and no relevant notifications are missed.