9 Application Settings

Audience:	All users
Summary:	Describes how to change email notification settings and column preferences.
Contents:	

Overview

Each user can edit his or her email settings (that is, the type and timing of email notifications) and column preferences (that is, the type and order of information displayed in the List section). No other user can change your individual settings.

Email Preferences

The Email Preferences page enables users to specify the frequency with which they receive the following types of email messages, and control whether outgoing emails contain contact information.

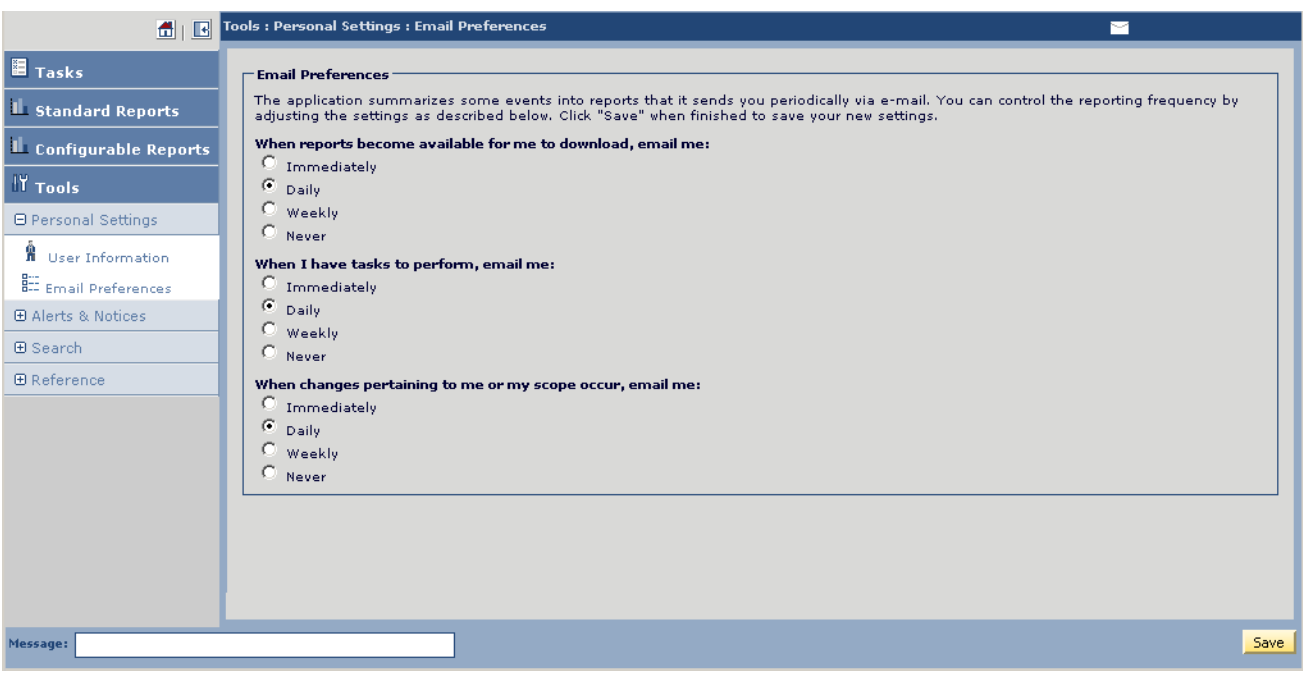
- Available Report messages inform users when a report they have requested, is ready to download for viewing or saving to one of three formats.
- Required Task messages informs the user has an additional task to perform within the application (for example, a transaction requires sign-off).
- Important Change messages inform users of important changes to them or their scope of management (for example, a spend monitor has exceeded a specified percentage of its spend ceiling or a user has been added to the application and the recipient of the email needs to click a link to create a password.)

You can control the frequency with which you receive these types of email messages by adjusting the settings as described below.

❑ **To set frequency of email notification:**

1 Click **Tools** → **Personal Settings** → **Email Preferences** in the Left Navigation bar to display the Email Preferences page (see Figure 9-1).

Figure 9-1: Email Preferences page



2 Click the appropriate radio button to specify when you want to receive notifications about tasks you need to perform within the application. You can choose to receive email notifications **Immediately** (as soon as changes occur), **Daily** (every day), **Weekly**, or **Never**.

3 Click **Save**.

> **NOTE**: Even if you set your email preferences to **Never**, there are some emails generated by the application that are sent regardless of your email preference setting. For example, if your email preferences are set to **Never**, but you click the **Forgot your password** link on the Login page (see Figure 2-4 on page 20), the application will send you an email with instructions on how to create a new password.

Column Preferences

You can specify which column information is displayed, and its order, on the application pages that list document information (requests, transactions, and reimbursement requests). You can change your column preferences at any time from any of these pages, in any queue.

Column preferences can be applied to requests requiring approval, approved requests, transactions, and reimbursement requests. After saving your column preferences, your selections take effect immediately, and, the next time you log into the application, your saved column preferences display.

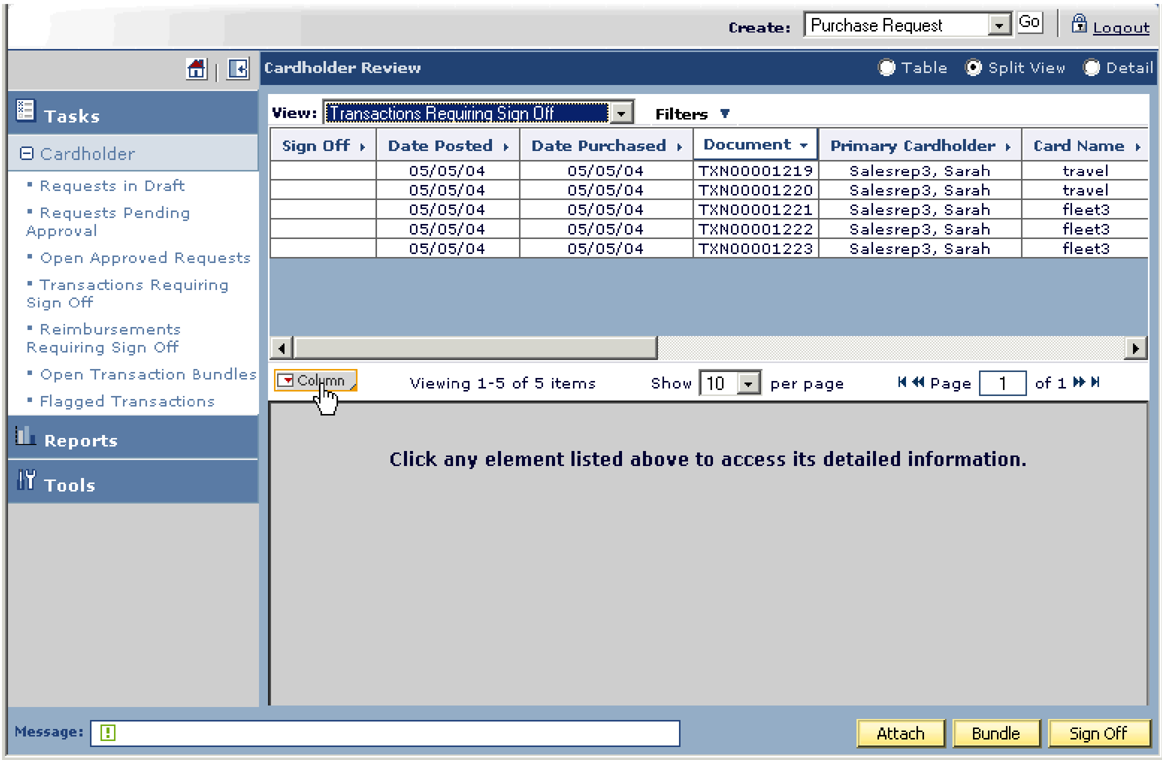
❑ **To set your column preferences:**

1 Access the desired document type from the appropriate queue. For example, to change the column preferences for transactions, click **Tasks** → **Cardholder** → **Transactions Requiring Sign Off** in the Left Navigation bar.

> **NOTE**: See chapter 3, “Locating Document Types” for information on other methods for locating the desired document type.

10 Click **Column** (see Figure 9-2).

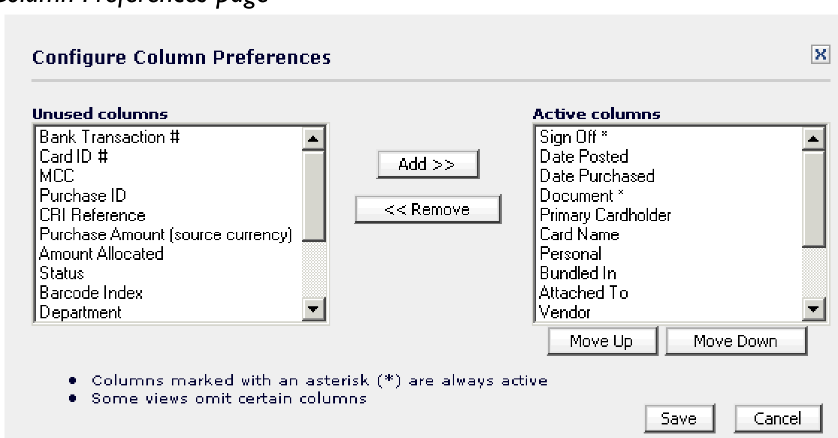
Figure 9-2: Column button



NOTE: Although the Transactions Requiring Sign Off queue is shown in this example, you can set your column preferences from any document type by first accessing the desired document type, then clicking the **Column** button.

The Configure Column Preferences page displays (see Figure 9-3).

Figure 9-3: Configure Column Preferences page



Items in the **Unused Columns** list are currently not displayed in the application. Items in the **Active Columns** list are currently displayed in the order shown.

2 To display an unused column, click the desired item in the **Unused Columns** list, then click **Add**.

3 To remove an active column, click the desired item in the **Active Columns** list, then click **Remove**.

IMPORTANT: If a column is marked with an asterisk (*), you cannot remove the column.

4 To change the order in which the columns are displayed, click (to highlight) the desired item in the Active Columns list, then click **Move Up** or **Move Down** until the item is in the desired location. Note that columns are listed in the application in the order in which they appear in the **Active Columns** list.

> **IMPORTANT**: The available items in each list differ depending on the document type you accessed. You can set column preferences for requests requiring approval, approved requests, transactions, and reimbursement requests.

> **NOTE**: If the transaction used foreign currency, the Purchase Amount column in the application automatically displays both the foreign currency amount and the conversion to US dollar amount on the transaction's detail page. If applicable, the Purchase ID (PID) number is supplied by the merchant in the electronic transaction. This information (if any) is included in the export file.

5 Click **Save**.