Setting Up Email Notifications (For Approval Workflow ONLY)
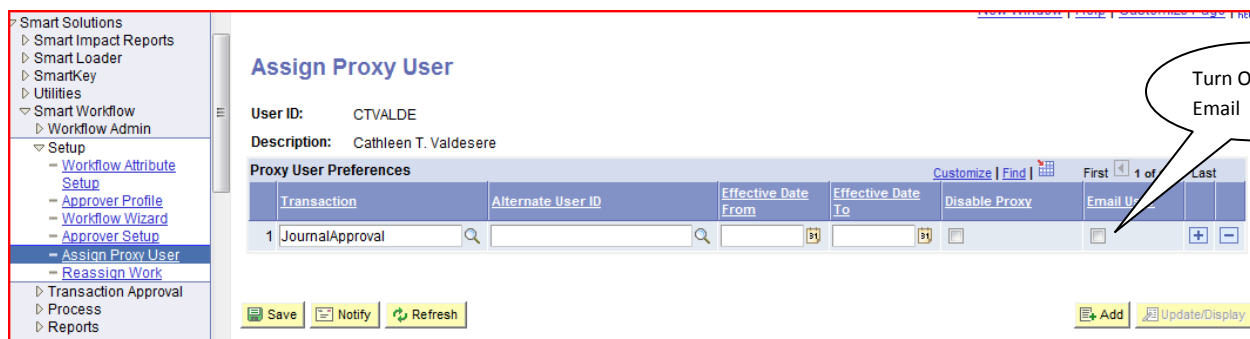
In Compass, as an approver, you can receive automatic email notifications for selected approval workflow transactions.

Note: On the **Assign Proxy User** screen, you can turn automatic workflow email notification on or off, as well as assign a proxy user for yourself.

Procedure

To receive email notifications of selected workflow transactions, use the following procedure:

1. Click **Smart Solutions > Smart Workflow > Setup > Assign Proxy User**.
2. Select the type of transaction for which you want to receive email notifications (e.g., Journal, Expense Report Approval, Payment Request, etc.)
3. To turn email notifications ON, click the **Email Notification** check box. To turn email notification OFF for the transaction, click the **Email Notification** check box to remove the selection.
4. Click the **+** button on the right of the screen to add another transaction type. An additional line is displayed to add the transaction. If you do not need to add another transaction type, skip this step.
5. Click **Save** to complete the transaction

> *Note:* The **Assign User Proxy** screen is also used to assign a proxy for an approver. Use the following procedure to set up an approval proxy in Compass.

Setting Up an Approval Proxy

A proxy allows another user to approve transactions (not documents) on your behalf. You can set up an approval proxy on the **Assign Proxy User** screen, the same screen you used to establish workflow email notifications.

To set up an approval proxy:

1. Click **Smart Solutions > Smart Workflow > Setup > Assign Proxy User**.
2. On the **Assign Proxy User** screen, type the other user's user ID in the **Alternate User ID** field.
3. Enter the dates that the other user will act as your proxy. You must enter a **minimum of 30 days**.
4. Click **Save** to complete the transaction.