

Log into AggieBuy and you will come to the HOME screen which will look like this:

The screenshot shows the AggieBuy website home page. At the top, there is a navigation bar with the Texas A&M University logo, a search bar, and a user profile icon. A red arrow points from the user profile icon to a dropdown menu that is open, showing the user's name 'Lindy Beasley' and several options: 'View My Profile', 'Dashboards', 'Manage Searches', 'Manage Search Exports', and 'Set My Home Page'. Below the dropdown menu, there is a message that says 'You do not have any recent orders' and buttons for 'Logout' and 'Help'. The main content area of the page features a 'Shop' dropdown menu, a search bar, and several sections of 'Showcased Suppliers' including WorkQuest, TEJAS, Office Depot, Avira, Dell, CDW, and Burgoon Grainger. A blue callout box with a black border contains the following instructions:

1. Click on your person in the top right corner and you will get the pop out box below.
2. Click on View My Profile and you will get the screen below

Once View My Profile is chosen you will get this screen:

The screenshot shows the user profile page for Lindy Beasley. The page is titled "User's Name, Phone Number, Email, etc." and displays various user details. A sidebar on the left contains a menu with "Notification Preferences" and "Form Requests" highlighted. Two callout boxes with arrows point to these items, with text instructions: "Click NOTIFICATION PREFERENCES." and "Click FORM REQUESTS." A "Save Changes" button is visible at the bottom right of the profile section.

TEXAS A&M UNIVERSITY Requisition Num

My Profile ▶ User's Name, Phone Number, Email, etc.

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Lindy Beasley

User Name 806000196

User Profile and Preferences ▾

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Guided Tour Instructions
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >

User's Name, Phone Number, Email, etc.

First Name Lindy

Last Name Beasley

Phone Number +1 979-845-0099

Mobile Phone Number

Inte

E-mail Address * LB

Business Unit 02-Texas A&M University (02)

Ordering Department 02-CCOM (02-CCOM)

Authentication Method LoginXML

User Name * 806000196

on Terms and Conditions accepted on 12/6/2019 4:15 PM Terms and Conditions

Save Changes

Notification Preferences ▾

- Administration & Integration
- Shopping, Carts & Requisitions
- Change Requests
- Purchase Orders
- Catalog Management
- Accounts Payable
- Receipts
- Contracts
- Sourcing Director
- Supplier Management
- Form Requests

Click NOTIFICATION PREFERENCES.

Click FORM REQUESTS

Once you click FORM REQUESTS you will see the following screen:

The screenshot displays the 'Notification Preferences: Form Requests' page for user Lindy Beasley. The page is divided into a left sidebar with navigation options and a main content area. The main content area shows a list of notification types under the 'Form Request Review Workflow' section. A red arrow points from a callout box to the 'Edit Section' button. Another red arrow points from a second callout box to the 'Override' radio button for the 'Form Request Workflow Notification Available' notification type. At the bottom right, there are 'Save Changes' and 'Cancel' buttons.

Notification Preferences: Form Requests

Form Request Review Workflow [Edit Section](#)

Notification Type	Notification
Form Request Pending Approval in Workflow	Notification
Form Request Workflow Notification Available	Notification
Form Request Workflow Error	Notification
Form Request Potential Duplicate Supplier	Notification
Form Request Approved in Workflow	Notification
Form Request Rejected in Workflow	Notification
Form Request Completed in Workflow	Notification
Form Request Pending Ad-Hoc Workflow Approval	None
Form Request Contract is Executed	None

When you click EDIT SECTION the screen will open up like below.

The "question mark" found by each of the selections will give an explanation of that notification. To change the notification type you will need to click on the "Override" button.

Notification Preferences: Form Requests

Form Request Review Workflow

Notification Type	Default	Override	Notification
Form Request Pending Approval in Workflow	<input type="radio"/>	<input type="radio"/>	Notification
Form Request Workflow Notification Available	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Workflow Error	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Potential Duplicate Supplier	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Approved in Workflow	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Rejected in Workflow	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Completed in Workflow	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Pending Ad-Hoc Workflow Approval	<input checked="" type="radio"/>	<input type="radio"/>	None
Form Request Contract is Executed	<input checked="" type="radio"/>	<input type="radio"/>	None

[Save Changes](#) [Cancel](#)

Once you click Override your screen will look like this:

TEXAS A&M UNIVERSITY

Requisition Number Search (Alt+Q) 0.00 USD Logout

My Profile Notification Preferences Form Requests

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Lindy Beasley
User Name 806000196

User Profile and Preferences
Update Security Settings
Default User Settings
User Roles and Access
Ordering and Approval Settings
Permission Settings
Notification Preferences
Administration & Integration
Shopping, Carts & Requisitions
Change Requests
Purchase Orders
Catalog Management
Accounts Payable
Receipts
Contracts
Sourcing Director
Supplier Management
Form Requests
User History
Administrative Tasks

Notification Preferences: Form Requests

Form Request Review Workflow	Default	Override	Notification
Form Request Pending Approval in Workflow	<input type="radio"/>	<input checked="" type="radio"/>	Notification
Form Request Workflow Notification Available	<input type="radio"/>	<input checked="" type="radio"/>	Notification
Form Request Workflow Error	<input checked="" type="radio"/>	<input type="radio"/>	None Email Notification Email & Notification
Form Request Potential Duplicate Supplier	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Approved in Workflow	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Rejected in Workflow	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Completed in Workflow	<input checked="" type="radio"/>	<input type="radio"/>	Notification
Form Request Pending Ad-Hoc Workflow Approval	<input checked="" type="radio"/>	<input type="radio"/>	None
Form Request Contract is Executed	<input checked="" type="radio"/>	<input type="radio"/>	None

Save Changes Cancel

If you select to receive NOTIFICATIONS this is where your notifications will appear (the little bell will show a number which references the number of notifications you have).

This is where you will select if you want an "Email" or "Notification" or both an "Email & Notification" when the provided action happens with a Contract Form Request.

If you select Email you will get an Email from AggieBuy in your Email Inbox when that particular Form Request action happens.

If you select Notification then you will ONLY receive a Notification in AggieBuy when that particular action happens.

If you select both then you receive both.

After you make your choices **BE SURE TO click the blue button that says SAVE CHANGES.** Otherwise your choices will not stick.

Next, to set your notification preferences for Contracts you will click on CONTRACTS and will see the screen below.

Lindy Beasley

User Name 806000196

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences ▾
 - Administration & Integration
 - Shopping, Carts & Requisitions
 - Change Requests
 - Purchase Orders
 - Catalog Management
 - Accounts Payable
 - Receipts
 - Contracts**
 - Sourcing Director
 - Supplier Management
 - Form Requests
- User History >
- Administrative Tasks >

Notification Preferences: Contracts



Contracts

[Edit Section](#)

Contract Budget/Tier Notification ?	Notification
Contract Start Date - Advance Notice ?	Email & Notification
Contract Start Date Passed ?	Notification
Contract End Date - Advance Notices ?	Email & Notification
Contract End Date Passed ?	Email & Notification
Contract Renewal Date - Advance Notices ?	Email & Notification
Contract Renewal Date Passed ?	Notification
Contract Review Date Passed ?	Notification
Contract Internal Review Notification ?	Email & Notification
Contract Manager Internal Review Notification ?	Notification
Contract Facilitation Notification ?	Email & Notification
New Contract Request Discussion Thread ?	Email & Notification
New Contract Request Discussion Reply ?	Email & Notification
External Reviewer Email Failure ?	Email & Notification
Contract Originated From Salesforce ?	None
Contract Renewal Auto-Created ?	Notification
Contract Renewal Auto-Executed ?	Notification
Contract Renewal Auto-Execute Failure ?	Notification
Zero Auto-Renewals Remain ?	Email & Notification
Contract Workflow Notification ?	Notification
New Contract Communication ?	Email & Notification

Again, this is where you will select if you want an "Email" or "Notification" or both an "Email & Notification" when the provided action happens with a Contract.

After you make your choices **BE SURE TO click the blue button that says SAVE CHANGES.** Otherwise your choices will not stick.

▼ Contract - Approval Workflow

[Edit Section](#)

Contract Returned Notice ?	Email & Notification
Contract Rejected Notice ?	Email & Notification
Rejected Contract Returned to Draft ?	Email & Notification
Contract Pending Workflow Approval ?	Email & Notification
Contract Pending Workflow Ad-Hoc Approval ?	Email & Notification
Contract Approval Workflow Error ?	Email & Notification
Contract Sent to eSignature Application ?	Notification
Contract Pending Upload of Signed Document ?	Email & Notification
Contract Declined Signature ?	Email & Notification
Contract Approval Workflow Completed ?	Email & Notification

▼ Contract Obligations

[Edit Section](#)

Contract Obligation Advance Notification ?	Email & Notification
Contract Obligation Due Date Notification ?	Email & Notification
Contract Obligation Past Due Notification ?	Email & Notification
Contract Obligation Complete Notification ?	Email & Notification

That should be all the notifications that you need to set. Let me know if questions!