

How to: **Manage User Notifications:**

This step-by-step guidance provides information on how to manage which notifications for Returns individual Users will receive.

To manage User notifications, please complete the following steps:

- i. A Firm/System Administrator can see for what Returns individual Users as Primary or Secondary Contacts, and can change those settings for Users. Once logged in as the Firm Administrator, on the *Home Page*, select '**Administration**' as shown in figure 1.1.

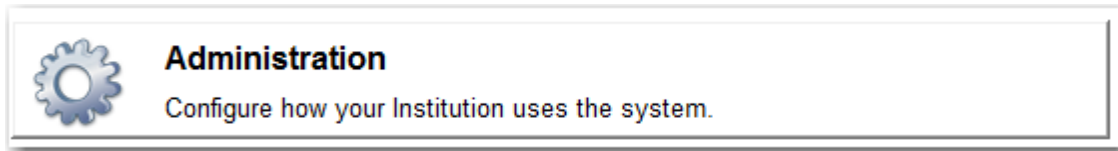


Figure 1.1

- ii. On the *Institution Administration Page* in figure 1.2 select '**Manage Notifications**'.

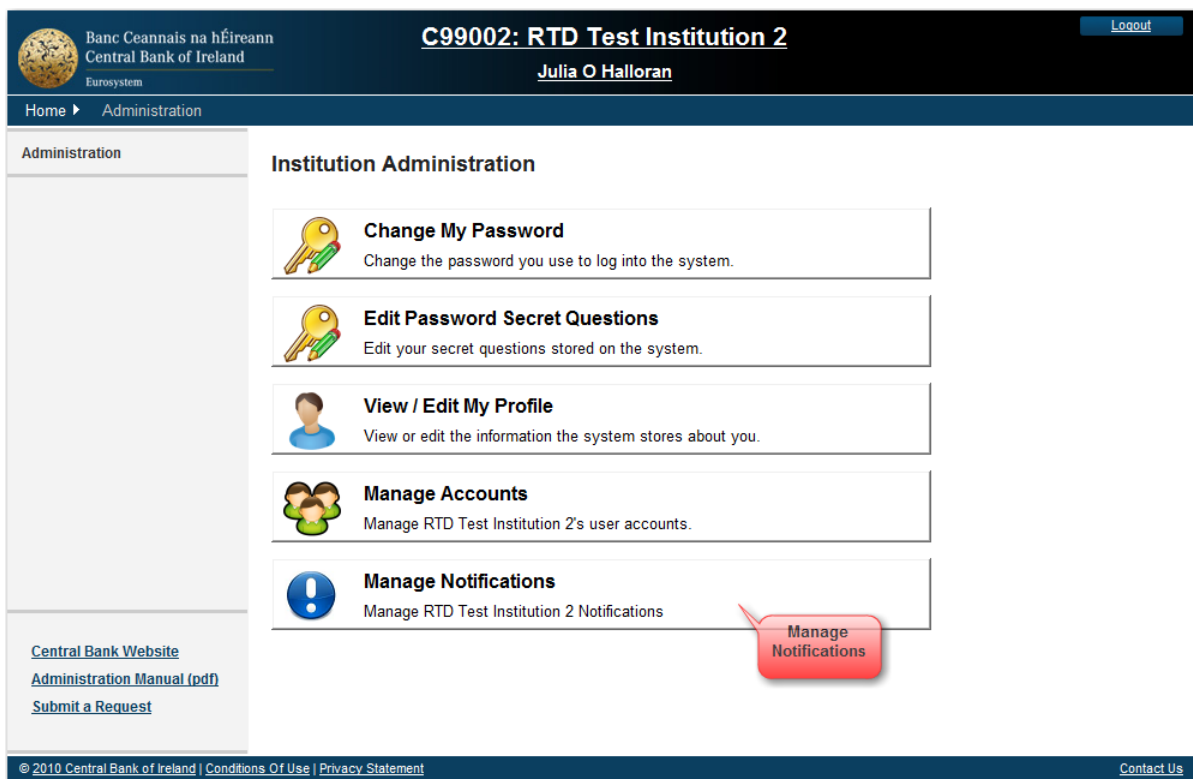


Figure 1.2

- iii. Select '**View User Notifications**' as can be seen in figure 1.3.

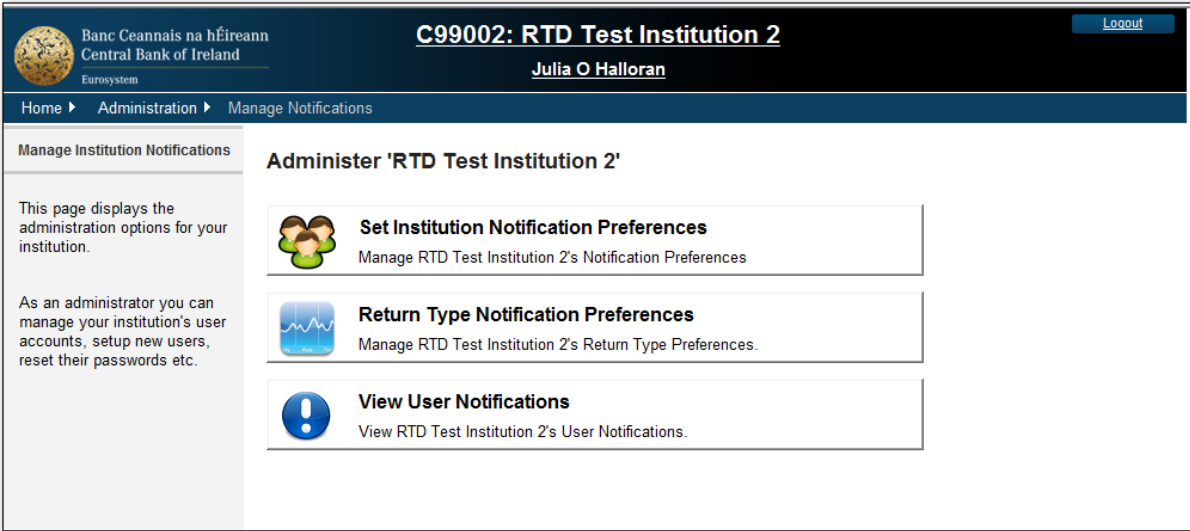


Figure 1.3

iv. Figure 1.4 shows the notification settings for Users.

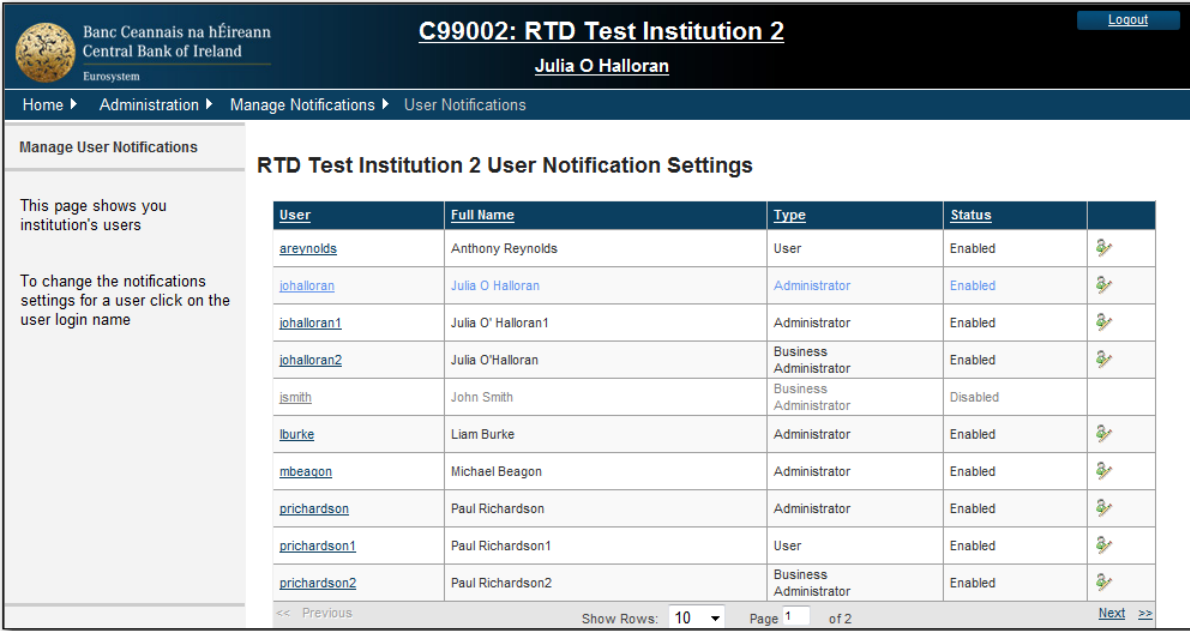



Figure 1.4

v. Select the User's name to see whether they are set up as a contact on a specific return as can be seen in figure 1.5. Check and uncheck the boxes in order to manage their notifications and select 'Update Settings'.



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Home ▶ Administration ▶ Manage Notifications ▶ User Notifications ▶ prichardson

User Notification Settings

This page shows the notification settings 'Paul Richardson' has to each return type

For maximum security, you should only grant minimum access that this user needs to do his or her job

To enable/disable notifications for all return types click the buttons at bottom of page

Only Secondary Contacts can be changed on this page. Primary Contacts can be updated in the 'Return Type Notifications Preferences' section of 'Manage Notifications'

'Paul Richardson' Edit User Notification Settings

Return Type	Contact Type	
Bank Statements	Primary	<input checked="" type="checkbox"/>
Bank Statements - Quarterly Accounts	Secondary	<input type="checkbox"/>
Cover Pages (Consolidated)	Primary	<input checked="" type="checkbox"/>
Deposit Protection	Secondary	<input type="checkbox"/>
FINREP Individual	Secondary	<input type="checkbox"/>
Funding Return	Secondary	<input type="checkbox"/>

Select All
Remove All

Update Settings
Cancel

Figure 1.5