

Tutorial:

SETTING UP AND CUSTOMIZING SUBSCRIPTION NOTIFICATIONS

Improve team communication and process transparency using subscription notifications.

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Subscribing users to notifications

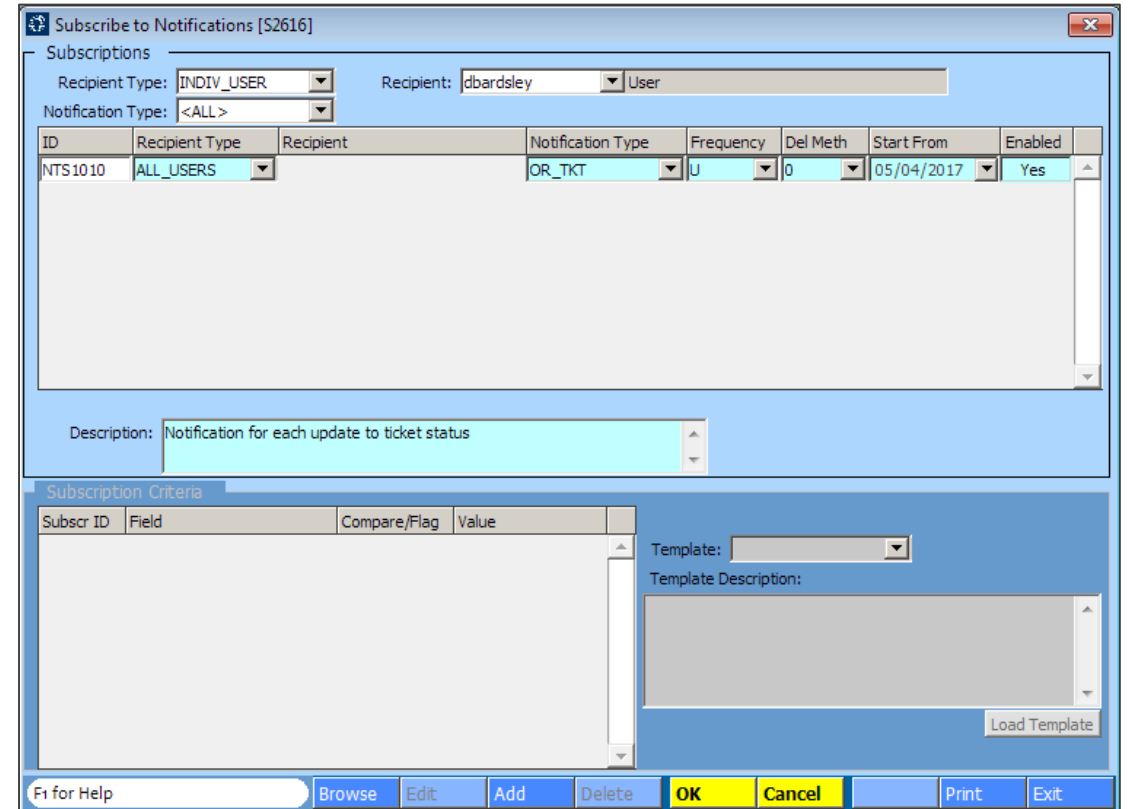
The **Subscribe to Notifications** screen enables plant system administrators to subscribe users to different types of email notifications depending on what action has been triggered on a screen.

Notifications subscriptions are a great way to inform team members when certain data is entered into the system, which improves communication and process transparency.

Before setting up the subscription notification, it is good practice to have an end goal in mind before setting up your notification logic.

A simple rule is:

- Who is receiving the notification;
- What information are they receiving;
- When are they receiving it. (Trigger)

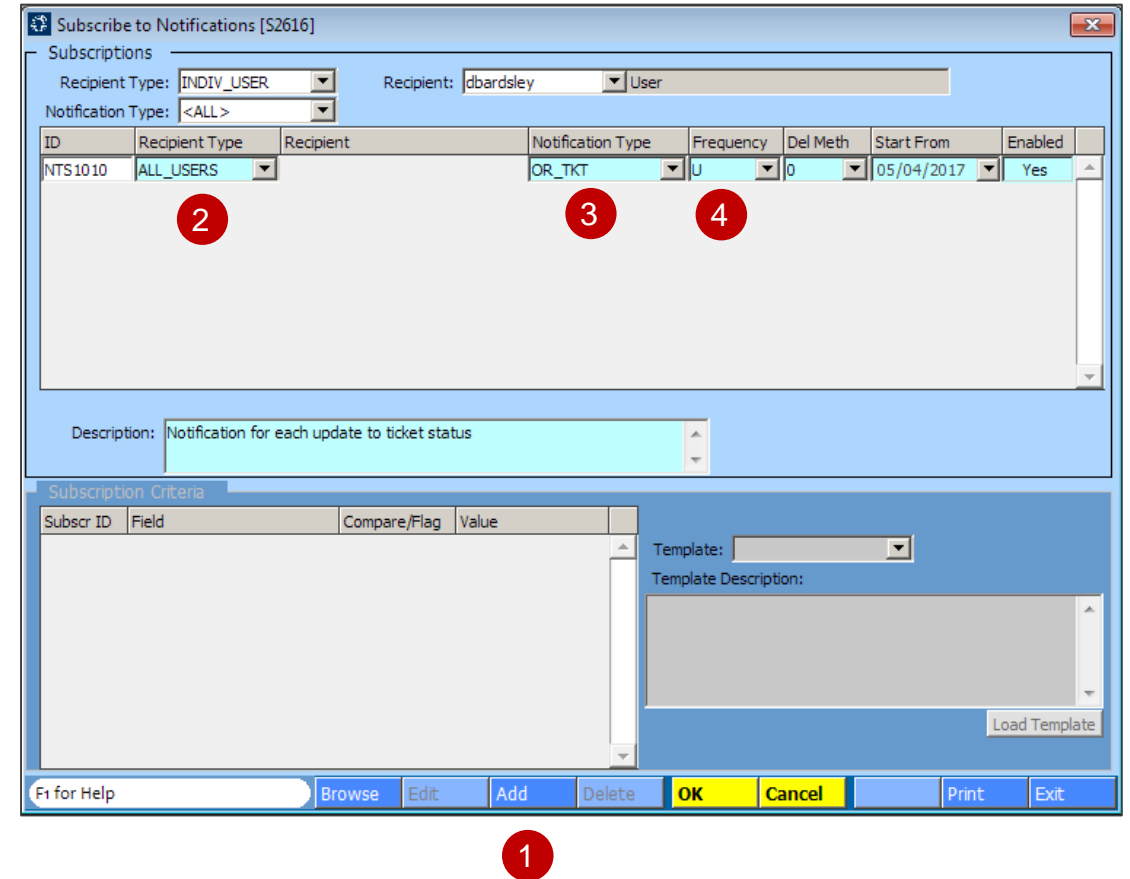


Defining the recipient requirements

For this example, we will be creating a new notification that will notify users who send an internal support ticket when the status priority changes.

Open the **Subscribe to Notifications [S2616]** screen.

1. Click **Add** on the bottom menu. (*When the new line item is added the ID field is populated automatically by the system.*)
2. Select the **ALL_USERS Recipient Type** option from the drop down menu.
3. Select the **OR_TKT Notification Type**.
4. Select the **Once on Update Frequency** from the listed options.



Defining the recipient requirements - cont

5. Select the **Delivery Method (Del Meth)**.
6. Pick a **Start From Date** from the calendar.
7. The **Enabled** field allows the notification to be switched to Yes or No. Click inside the field to change this option.
8. Enter an optional **Description**.
9. Click **OK** when complete.

The screenshot shows the 'Subscribe to Notifications [S2616]' dialog box. It features a 'Subscriptions' section with a table and a 'Description' field. Below is the 'Subscription Criteria' section with a table and a 'Template' field. The 'OK' button is highlighted in yellow.

Subscriptions

Recipient Type: INDIV_USER Recipient: dbardsley User
Notification Type: <ALL>

ID	Recipient Type	Recipient	Notification Type	Frequency	Del Meth	Start From	Enabled
NTS1010	ALL_USERS		OR_TKT	U	0	05/04/2017	Yes

Description: Notification for each update to ticket status

Subscription Criteria

Subscr ID	Field	Compare/Flag	Value
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Template: [Dropdown]
Template Description: [Text Area]
Load Template

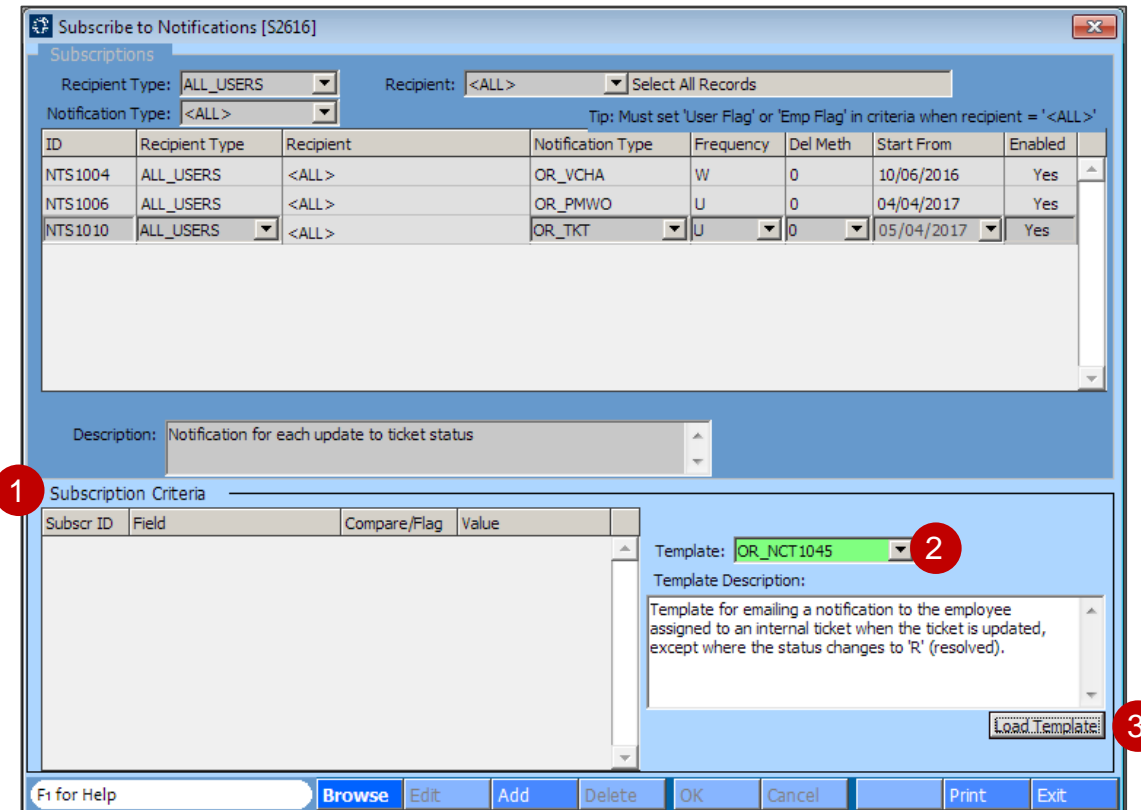
F1 for Help Browse Edit Add Delete **OK** Cancel Print Exit

Selecting the notification template

The subscription Criteria frame allows admin users to select a pre-loaded criteria template.

For this example we have chosen a template that will send an email notification to the sender of an internal ticket when the status has been changed to “resolved”.

1. Click in the **Subscription Criteria** frame.
2. Select the **Template** from the drop down menu. (*The template will have a detailed description outlining how it functions.*)
3. Click on the **Load Template** button.



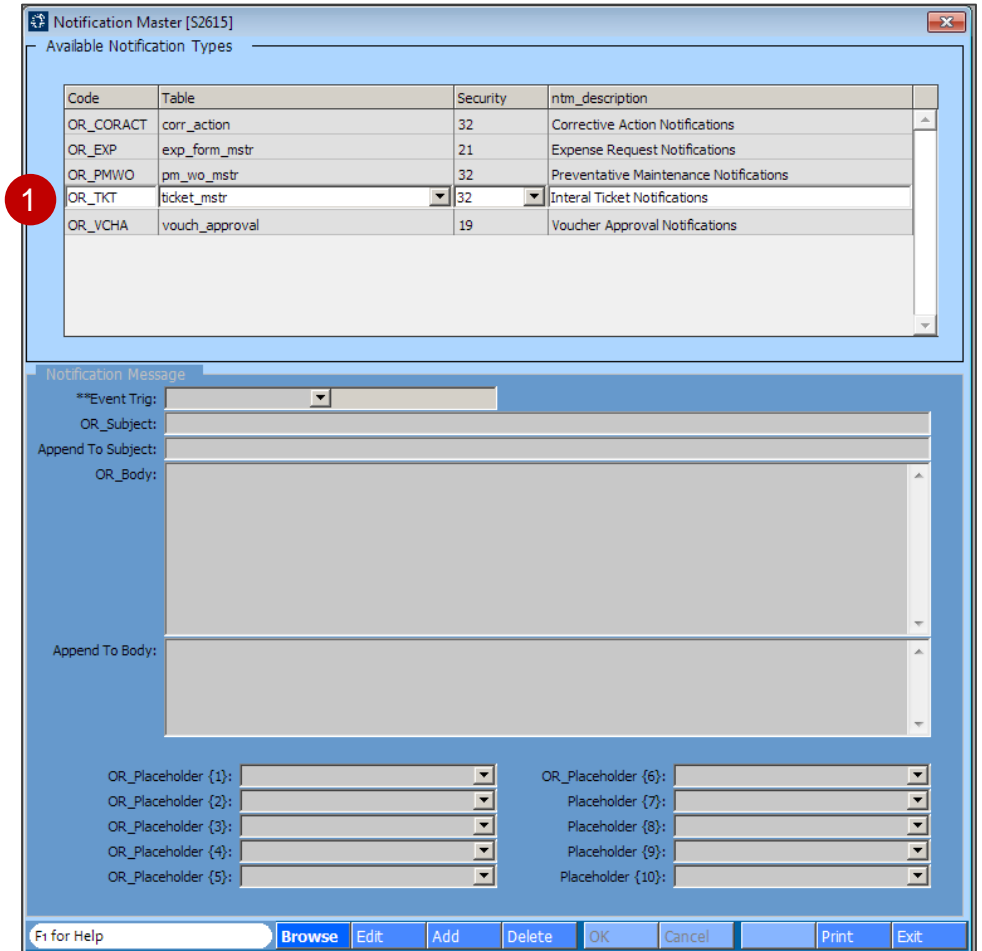
UPDATING OR CUSTOMIZING NOTIFICATION MESSAGES

Selecting the notification type to edit

The **Notification Master [S2615]** screen enables system admin users to make simple edits to existing templates or to create a customized notification message.

1. To create a notification type from a pre-loaded template, select the **Available Notification Type** from the list.

Note: *Pre-generated OnRamp templates start with the code "OR".*



The screenshot shows the 'Notification Master [S2615]' application window. The top section, titled 'Available Notification Types', contains a table with the following data:

Code	Table	Security	ntm_description
OR_CORACT	corr_action	32	Corrective Action Notifications
OR_EXP	exp_form_mstr	21	Expense Request Notifications
OR_PMWO	pm_wo_mstr	32	Preventative Maintenance Notifications
OR_TKT	ticket_mstr	32	Internal Ticket Notifications
OR_VCHA	vouch_approval	19	Voucher Approval Notifications

A red circle with the number '1' is positioned to the left of the 'OR_TKT' row. Below the table is a 'Notification Message' section with the following fields:

- **Event Trig: [Dropdown]
- OR_Subject: [Text Field]
- Append To Subject: [Text Field]
- OR_Body: [Large Text Area]
- Append To Body: [Text Field]

At the bottom, there are two columns of placeholder selection fields:

- OR_Placeholder {1}: [Dropdown]
- OR_Placeholder {2}: [Dropdown]
- OR_Placeholder {3}: [Dropdown]
- OR_Placeholder {4}: [Dropdown]
- OR_Placeholder {5}: [Dropdown]
- OR_Placeholder {6}: [Dropdown]
- Placeholder {7}: [Dropdown]
- Placeholder {8}: [Dropdown]
- Placeholder {9}: [Dropdown]
- Placeholder {10}: [Dropdown]

The bottom of the window features a toolbar with buttons: F1 for Help, Browse, Edit, Add, Delete, OK, Cancel, Print, and Exit.

Editing the notification message

2. Click on the **Notification Message** frame
3. Select the **Event Trigger** you want from the drop down menu. The Notification Message will be populated with pre-loaded placeholders.
4. The template **Placeholders** correspond with fields from the screen that you want the notification triggered from.
5. If you would like to make limited changes to the template, click the **Edit** button on the bottom menu.

Note: When editing a template, users are advised to customize the (Append) fields only since the other fields will revert back to their original state when the system is updated with any new release.

Notification Master [S2615]

Available Notification Types

Code	Table	Security	ntm_description
OR_CORACT	corr_action	32	Corrective Action Notifications
OR_EXP	exp_form_mstr	21	Expense Request Notifications
OR_PMWO	pm_wo_mstr	32	Preventative Maintenance Notifications
OR_TKT	ticket_mstr	32	Internal Ticket Notifications
OR_VCHA	vouch_approval	19	Voucher Approval Notifications

Notification Message

**Event Trig: [] INSERT

OR_Subject: New Priority {1} Ticket [{2}] Submitted by {3}

Append To Subject:

OR_Body:

Ticket ID: {2}

Title: {4}

Priority: {1}

Assigned to: {6}

Description: {5}

Append To Body:

OR_Placeholder {1}: tkm_priority

OR_Placeholder {2}: tkm_id

OR_Placeholder {3}: tkm_created_by_user

OR_Placeholder {4}: tkm_name

OR_Placeholder {5}: tkm_desc

OR_Placeholder {6}: tkm_assigned_to

Placeholder {7}:

Placeholder {8}:

Placeholder {9}:

Placeholder {10}:

F1 for Help Browse Edit Add Delete OK Cancel Print Exit

Customizing the notification message

- To add any additional information to the subject line use the **Append to Subject** field. You can either type in text or select a **Placeholder** with preloaded information.
- To add additional information from the data table to the subject line, type the number of the corresponding **Placeholder** number and include the brackets.
- Enter any additional messaging to the **Append to Body** field.
- Click the **OK** button when complete.

Code	Table	Security	ntm_description
OR_CORACT	corr_action	32	Corrective Action Notifications
OR_EXP	exp_form_mstr	21	Expense Request Notifications
OR_PMWO	pm_wo_mstr	32	Preventative Maintenance Notifications
OR_TKT	ticket_mstr	32	Internal Ticket Notifications
OR_VCHA	vouch_approval	19	Voucher Approval Notifications

Notification Message

**Event Trig: [Once on INSERT]

OR_Subject: New Priority {1} Ticket [{2}] Submitted by {3}

Append To Subject: !!Priority Alert!! {7} 6

OR_Body: Ticket ID: {2}

Title: {4}

Priority: {1}

Assigned to: {6}

Description: {5}

Append To Body: Thank you for sending a support ticket. One of our support team will respond within 1 business day. 8

OR_Placeholder {1}: tkm_priority

OR_Placeholder {2}: tkm_id

OR_Placeholder {3}: tkm_created_by_user

OR_Placeholder {4}: tkm_name

OR_Placeholder {5}: tkm_desc

OR_Placeholder {6}: tkm_assigned_to 7

Placeholder {7}: tkm_classification

Placeholder {8}:

Placeholder {9}:

Placeholder {10}:

F1 for Help Browse Edit Add Delete OK Cancel Print Exit

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CREATING A CUSTOM SUBSCRIPTION NOTIFICATION

Customized subscription notifications

To create a custom **Subscription Notification** and **Subscription Criteria** contact OnRamp with your request by sending a support ticket, click on the link to send a support ticket.

<http://www.onramp-solutions.com/onramp-blog/sending-onramp-support-ticket>

Make sure to provide detailed instructions about who will receive the notification, when they will receive it, the content of the message and how the notification will be triggered.

Note: *Creating and setting up a custom notification trigger requires the specific field on the specific screen to be activated within a data table, which only OnRamp developers have access to.*

The screenshot shows the 'Subscribe to Notifications [S2616]' application window. It is divided into two main sections: 'Subscriptions' and 'Subscription Criteria'.

Subscriptions Section:

- Recipient Type: ALL_USERS
- Recipient: <ALL> (with a 'Select All Records' button)
- Notification Type: <ALL>
- Tip: Must set 'User Flag' or 'Emp Flag' in criteria when recipient = '<ALL>'
- Table with columns: ID, Recipient Type, Recipient, Notification Type, Frequency, Del Meth, Start From, Enabled.

ID	Recipient Type	Recipient	Notification Type	Frequency	Del Meth	Start From	Enabled
NTS1004	ALL_USERS	<ALL>	OR_VCHA	W	0	10/06/2016	Yes
NTS1006	ALL_USERS	<ALL>	OR_PMWO	U	0	04/04/2017	Yes
NTS1010	ALL_USERS	<ALL>	OR_TKT	U	0	05/04/2017	Yes

Description: Notification for each update to ticket status

Subscription Criteria Section:

Subscr ID	Field	Compare/Flag	Value
NTS1010	tkm_priority	<	3

Template: [Dropdown]
Template Description: [Text Area]
Load Template [Button]

Buttons at the bottom: F1 for Help, Browse, Edit, Add, Delete, OK, Cancel, Print, Exit.