



NOTIFICATIONS

ADMINISTRATION TOOL

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WHAT IS A NOTIFICATION?

A notification is a mail sent to a user when a particular action, or “event”, has occurred in the server. This even can be, for instance, the creation of a folder, a document update, etc.

It is possible to set two types of notifications:

- **User notification**: notification auto-assigned by the users in the Web Client, on a specific event;

For instance, a user named John Smith wishes to receive a notification as soon as a document is created in the “Bills” folder.

- **Global notification**: notification assigned by the **administrator** to specific users, related to a specific event.

For instance, as soon as a document is created in the Web Client, John Smith receives a notification.

CONFIGURING A USER NOTIFICATION

User notifications particularity: it is not mandatory to configure them. The notification mail will be sent to the user that asked for it, even if the notification has not been configured. The configuration of user notifications in the Administration tool allows you to select the form(s) for which the notification will be activated, and also to specify a customized mail to send, instead of the default one.

To configure a user notification:

1. In the left pane of the Administration Tool, open the branch corresponding to the database of your choice.
2. Click on the **Notifications** sub-branch and then on **User notifications**.

The notifications management screen is displayed in the right pane.

3. In the bottom left corner of the right pane, click the **New** button.

An entry is displayed in the table.

4. Choose an event, in the drop-down menu of the **Event** field.
5. Choose optionally a form in the drop-down menu of the **Form** field.



If you do not choose a specific form, the notification will be applied to any form of the database.

6. Choose optionally an e-mail template, in the drop-down menu of the **E-mail template** field.



Choosing an e-mail template allows you to send a customized notification e-mail to the users. If you do not choose an e-mail template or if you have never configured one, a default notification e-mail will be sent to the users.

7. Click on **Apply**.

You have configured a user notification.

CONFIGURING A GLOBAL NOTIFICATION

To configure a global notification:

1. In the left pane of the Administration Tool, open the branch corresponding to the database of your choice.
2. Click on the **Notifications** sub-branch and then on **Global notifications**.

The notifications management screen is displayed in the right pane.

3. In the bottom left corner of the right pane, click the **New** button.

An entry is displayed in the table.

4. Choose an event, in the drop-down menu of the **Event** field.
5. Choose optionally a form in the drop-down menu of the **Form** field.



If you do not choose a specific form, the notification will be applied to any form of the database.

6. Choose optionally an e-mail template, in the drop-down menu of the **E-mail template** field.



Choosing an e-mail template allows you to send a customized notification e-mail to the user. If you do not choose an e-mail template or if you have never configured one, a default notification e-mail will be sent to the user.

7. Choose the notification recipient in the drop-down menu of the **Recipient** field.
8. Click on **Apply**.

You have configured a global notification.