

Standard Operating Procedure

12 - Notification Profile



A. Purpose

This process documents the steps taken to facilitate creating the necessary Notifications with an automatic reply to the Requestors and related parties.

B. Responsibilities

The following Roles can participate in this process:

- **Super User**
- **Maintenance Manager**
- **Customer Service**

These roles are tasked with the responsibilities for the 'Requestor List' and 'Notification Profile' Updates in order to make the notification process happen.

Step 1:

- Open **Requestor List** Form by Expanding the **Configuration** Folder from the Navigator
- Expand **Personnel** Subfolder
- Double Click **Requestor List** Form
- Press **F8** Function Key or Click the **Execute Query** Button  from the Tool Bar to show up all the Requestors on the list
- Select the **Requestors** to receive notification by Checking the **Notify Box**

**Notify
Check
Box**

Notify	Key	Key	Requestor	Employee ID	E-mail	Cellular Number	Pager
<input checked="" type="checkbox"/>			ABBOTT, MARY JANE		MARYJANE.ABBOTT@ITC		
<input type="checkbox"/>			ADAMS, CHRIS		CHRIS.ADAMS@AGO.ST.		
<input checked="" type="checkbox"/>			ALBANESE, JOSEPHINE		JOSEPHINE.ALBANESE@		
<input type="checkbox"/>			ANGELONI, LOUIS		LOUIS.ANGELONI@ITD.S		
<input checked="" type="checkbox"/>			ARCHER, ESTER		ESTHER.M.ARCHER@HR		
<input type="checkbox"/>			AU, MARY		MARY.AU@STATE.MA.US		
<input type="checkbox"/>			BAKER, BOBBI		BOBBI.BAKER@SEC.STA		
<input type="checkbox"/>			BALZER, BRAD		BBALZER@CPF.STATE.M		
<input checked="" type="checkbox"/>			BARR, RAMONA		ROMONA.BARR@DCP.SI		
<input type="checkbox"/>			BCOX				
<input type="checkbox"/>			BEASON, JOEL				
<input type="checkbox"/>			BEAULIEU, AGNES		AGNES.BEAULIEU@SEC		
<input type="checkbox"/>			BELLANTONI, PAT & JC				

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Step 1 (Continued):

- Or, if you need to Create a New Requestor, then
- Press **F6** Function Key or Click the **Insert Record** Button  from the Tool Bar to insert new Requestor information
- Before you select the 'Notify Requestors', make sure they have the **E-Mail** Addresses for Auto Notification Reply Process
- Close the **Requestor List** Form

The screenshot shows the 'Requestor Information' window in the CAMIS 8i application. The window title is 'CAMIS 8i (camisadmin@trng - Org ID 101)'. The menu bar includes 'File', 'Edit', 'Query', 'Record', 'Attachments', 'Window', and 'Help'. The toolbar contains various icons for file operations and navigation. The main area displays a table with the following columns: 'Key', 'Key', 'Notify Reqstr. Holder', 'Requestor', 'Employee ID', 'E-mail', 'Cellular Number', and 'Pager'. The table contains several rows of data, with the first row highlighted in yellow. A red circle is drawn around the table, and a red arrow points to the first row from the text 'Insert Record Row'. Another red arrow points to the 'E-mail' column from the text 'E-Mail Column'.

Key	Key	Notify Reqstr. Holder	Requestor	Employee ID	E-mail	Cellular Number	Pager
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ABBOTT, MARY JANE		MARYJANE.ABBOTT@ITD.		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ADAMS, CHRIS		CHRIS.ADAMS@AGO.ST.		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ALBANESE, JOSEPHIN		JOSEPHINE.ALBANESE@		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ANGELONI, LOUIS		LOUIS.ANGELONI@ITD.S		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ARCHER, ESTER		ESTHER.M.ARCHER@HR		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AU, MARY		MARY.AU@STATE.MA.US		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAKER, BOBBI		BOBBI.BAKER@SEC.STA		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BALZER, BRAD		BBALZER@CPF.STATE.M		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BARR, RAMONA		ROMONA.BARR@DCP.ST		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BCOX				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BEASON, JOEL				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BEAULIEU, AGNES		AGNES.BEAULIEU@SE		

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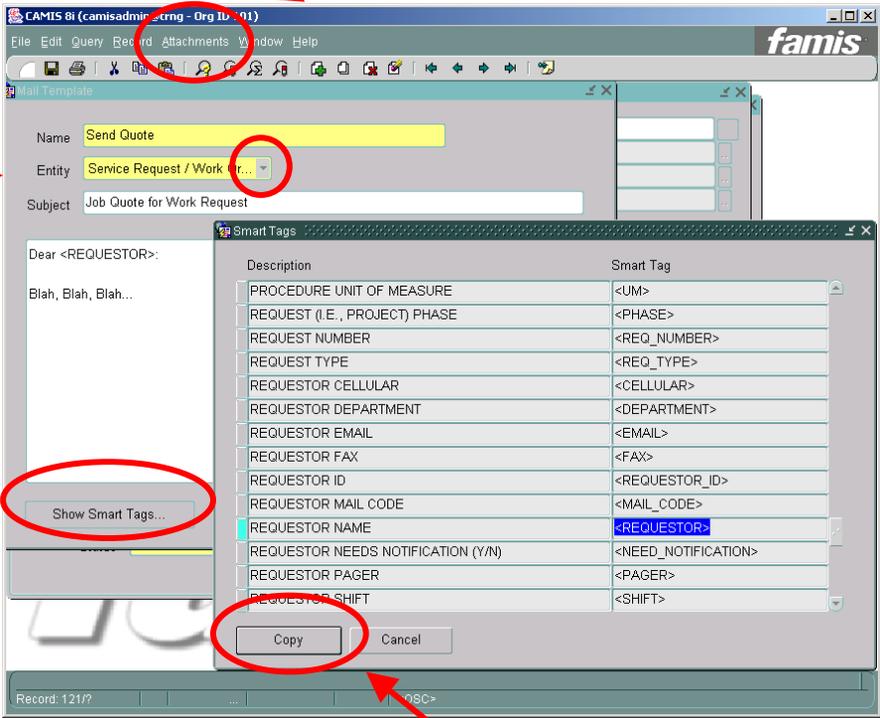
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Step 2:

- Open a Service Request (Work Order or Project) Form, Press the **Execute Query** Button  to retrieve a record to create a **Mail Template**
- Press the **Attachments** ⇒ **Mail Templates** from the Pull Down Menu
- A **Mail Template** Window will pop up
- Type in the **Name** of the Mail Template
- Select the **Entity** by pressing the Drop Down Menu
- Type in the **Subject**
- In the Body Field, Type the Template **Text**, you can select some **Merge Fields** by pressing the **Show Smart Tags...** at the bottom of the Form
- A **Start Tags** Window will show up
- Select the **Merge Field** by moving the scrolling up and down menu
- Click **Copy** Button to insert it into the text content
- The System will automatically place the **Merge Fields** at the beginning of the Body. If you want to relocate the Merge Fields, use the standard copy and paste method
- After finish up the Text, Close the **Mail Template** Window
- Click **Yes** to save the changes you have made
- Close the **Service Request** Window to finish the Template Creation process

Attachments ⇒ Mail Templates



Entity Drop Down Menu

Show Smart Tags ... Button

Smart Tags... Scroll Up and Down Menu

Copy Button

Description	Smart Tag
PROCEDURE UNIT OF MEASURE	<UM>
REQUEST (I.E., PROJECT) PHASE	<PHASE>
REQUEST NUMBER	<REQ_NUMBER>
REQUEST TYPE	<REQ_TYPE>
REQUESTOR CELLULAR	<CELLULAR>
REQUESTOR DEPARTMENT	<DEPARTMENT>
REQUESTOR EMAIL	<EMAIL>
REQUESTOR FAX	<FAX>
REQUESTOR ID	<REQUESTOR_ID>
REQUESTOR MAIL CODE	<MAIL_CODE>
REQUESTOR NAME	<REQUESTOR>
REQUESTOR NEEDS NOTIFICATION (Y/N)	<NEED_NOTIFICATION>
REQUESTOR PAGER	<PAGER>
REQUESTOR SHIFT	<SHIFT>

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Step 3:

- Open **Notification Profile** Form by Expanding the **Configuration** Folder from the Navigator
- Expand **Personnel** Subfolder
- Double Click **Notification Profile** Form
- Select **Requestor** Radio Box from the **Find Criteria** Section (you can also select either Building Manager, Zone Manager or Supervisor, etc.)
- Click **Find** Button on the Upper Right Hand Corner to show all the Requestors (who you have already checked 'Notify' from the previous Requestor List in Step 1)
- In this Form, you can check the appropriate **Check Box** to select the Automatic Reply Notifications for **Work Order** or **Project** when they are in **Creation** or **Closing** Statuses. In Work Order:
 - **XWO**: Express Work Order
 - **SR**: Service Request
 - **PR**: Project
 - **PM**: Preventive Maintenance
- The **Not.** Column will be automatically checked once you have attached this user with a Notification Template in the following steps.

Requestor Radio Box

Select the appropriate Check Box

Pick Employee	Name	Work Order				Project				Creation	Closing	Not.
		XWO	SR	PR	PM	XWO	SR	PR	PM			
<input type="checkbox"/>	ABBOTT, MARY JAN	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	ALBANESE, JOSEPH	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	ARCHER, ESTER	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>	BARR, RAMONA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	BUCKLEY, BOB	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	CAMISCOOR	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

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Step 3 (Continued):

- You can Group Change selected Requestors by Checking the Box in the **Pick** Column
- Press the **Mass Change** Button at the bottom of the Form

Select Requestors for Group Change

Mass Change Button

Pick	Employee	Requestor	Work Order Creation				Work Order Closing				Project		
			XWO	SR	PR	PM	XWO	SR	PR	PM	Creation	Closing	Not
<input checked="" type="checkbox"/>	ABBOTT, MARY JANI		<input checked="" type="checkbox"/>										
<input checked="" type="checkbox"/>	ALBANESE, JOSEPH		<input checked="" type="checkbox"/>										
<input checked="" type="checkbox"/>	ARCHER, ESTER		<input checked="" type="checkbox"/>										
<input checked="" type="checkbox"/>	BARR, RAMONA		<input checked="" type="checkbox"/>										
<input checked="" type="checkbox"/>	BUCKLEY, BOB		<input checked="" type="checkbox"/>										
<input checked="" type="checkbox"/>	CAMISCOOR		<input checked="" type="checkbox"/>										

- Update Work Order or Project **Check Box** for the selected Group of Requestors
- Press **Pull Down Menu** to select the pre-set **Template**
- Click **OK** Button to close the **Notification Mass Change** Form
- Close the **Notification Profile** Form to finish the Notification Process

Work Order or Project Check Box for Mass Change

Pull Down Menu for selecting Notification Template

Work Order Creation

XWO Template

PR Template

SR Template **Send Quote**

PM Template

Work Order Closing

XWO Template

PR Template

SR Template **Send Closing Report**

PM Template

Project

Creation Template

Closing Template