

## More Program Configuration – Email (event) Notifications

**Overview of Email Event Notifications:** The purpose of the MaintSmart Event Notification feature is to notify specified users by email when certain type of important events take place.

The events are configurable by a MaintSmart administrator.

The following types of events can trigger Event Notification.

1. Work Order-Related Events
  - a. Work Order Created
  - b. Work Order Edited
  - c. Work Order Status Changed
  - d. Work Request Created
  - e. Work Request Edited
2. Purchasing-Related Events
  - a. Quote Request Created
  - b. Requisition Created
  - c. Requisition Status Changed
  - d. Requisition Line Item Approved
3. Downtime-Related Events
  - a. Downtime Created
  - b. Downtime Edited

The recipients of the Event Notification emails can be configured by a MaintSmart administrator. Each event type can have a different list of recipients.

- 1.) Sender (The MaintSmart user that performs the create or edit.)
- 2.) Work Requestor (Work Requests only.)
- 3.) MaintSmart Users with email addresses
- 4.) Arbitrary email addresses

**Configuring Events and Email Addresses:** To configure Event Notifications navigate to the main Configuration screen and select menu "View" > "Email Notifications". The Event Notification Configuration screen will open and Event Notifications can be configured.

On this screen you can define up to one rule for each type of event per plant. A rule consists of the type of event that will trigger the notification and a set of users and email addresses to send the event notification to. To create an event notification rule all that is necessary is to pick the type event you want to create a rule for and specify the recipients to be notified each time the event occurs. Status Change events require that you specify which status values will trigger the event notification.

EvNotRuleID	Notification Type	Plant Identifier	NotifyRequestor	NotifyEng	NotifySender	Expr1
1	WOCreated	Sacramento	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sacramento
3	WorkRequestStatusChanged	Sacramento	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sacramento

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### Selecting Event Notification Recipients:

The sender or requestor is the MaintSmart user that creates or edits a MaintSmart item such as a Work Order. If you want the Sender to be notified when an event takes place, then place a check in the "Notify Sender" or "Notify Sender/Requestor" check box.

Notifications may also be sent to any MaintSmart users for whom email information has been provided. Select from the list of users with emails in the left-hand ("Users") list box and click the ">" button to move the user into the right-hand list box ("Send To Users"). To remove users from the list of "Send To Users" users, select the user to remove from the right-hand list box and click the "<" button.

To enter arbitrary email addresses type or paste the email address into the "Email Addresses" text box and click the "+" button. The Email address will be added to the list box. To remove an email address from the list box select it by clicking on it with the mouse and then either click the "-" button or press the delete key.

**A Note On Email Addresses:** Only recipients with email addresses that have been entered in MaintSmart will be displayed in the "Users" list-box. Recipients and Emails that appear in the "Users" and "Send To Users" list-boxes come from three different places in MaintSmart.

### Users

Email addresses are used that were entered for MaintSmart Users in the "Program Configuration Settings" screen that is accessible from the MaintSmart toolbar. The name and email address that are displayed in the list-box are separated by an equal sign. For example: "Keith DeSilva = kdesilva@xyz.com".

### Engineers (Applies only to Work Order events)

Email addresses are used that were entered for Engineers in the "Plant / Mechanic Configuration Screen". The name and email address that are displayed in the list-box are separated by a hyphen. For example: "Jon Schank - jschank@xyz.com".

### Requestors (Work Order Requestors)

Email addresses are used that were entered for Work Order Requestors in the "Work Order Requestors" that are accessible from the "Options" > "Requestors..." menu on the Work Order entry screen.

The name and email address that are displayed in the list-box are separated by a tilde. For example: "Carol Cook ~ ccook@xyz.com".

### Cloning Event Notification Rules:

If you need to create a new rule and use the same or similar set of recipients as a rule that has already been created you may clone an existing rule. Cloning a rule will copy all of its recipients into the rule entry form and all you will need to do is specify the rule type and optionally edit the set of recipients. To clone a rule you must not be currently editing or creating a new rule. Right-click in the grid on the rule you want to clone and select the "Clone" menu item.

Event Type	Plant Identifier	NotifyRequestor	Not
WOSStatusChanged	Sacramento	<input type="checkbox"/>	
RequestStatusChanged	Sacramento	<input type="checkbox"/>	

Clone

## More Program Configuration – Email Notifications for Work Order Events

### Setting Up Work Order Event Notifications:

First, select the type of Work Order event.

Note that a Work Request differs from a Work Order in that it is created by a user who is a Work Order Requestor and immediately after creation its status is "Request".

All Event Types for which rules have not yet been created will be displayed in the "Event Type" drop-down box.

If the type of Event Notification Rule is "WOStatusChanged" or "WorkRequestStatusChanged", then it is necessary to specify each status value for which the event will trigger a notification. In the example shown, the notification will occur whenever the status of a Work Order is changed to "Done". Multiple status values can be selected for a single rule.

If "Notify Sender/Requestor" is checked, then the user that created the Work Order will be notified.

If "Notify Engineer(s)" is checked, then all engineers (for whom email addresses have been entered in MaintSmart) that are assigned to a Work Order will be notified.

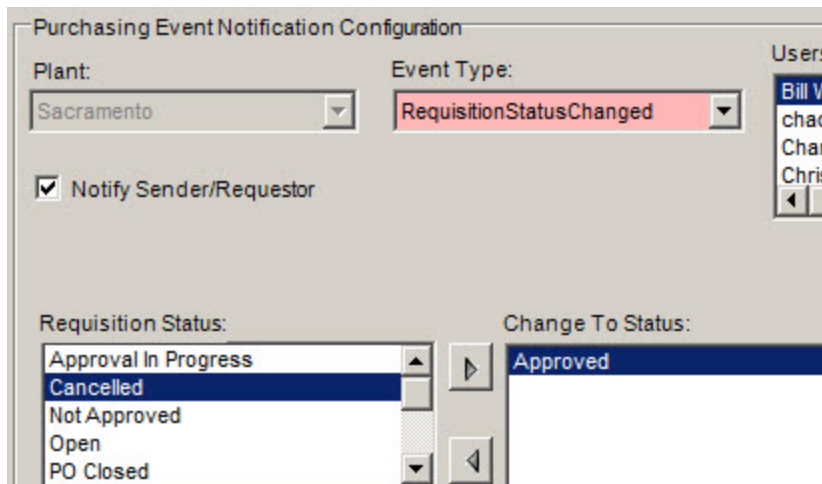
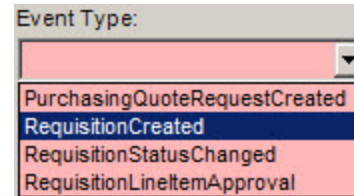
## More Program Configuration – Email Notifications for Purchasing Events

### Setting Up Purchasing/Requisition Event Notifications:

Purchasing Event Notifications notify users of the occurrence of events related to Quote Requests and Requisitions.

First, select the type of Purchasing event.

All Event Types for which rules have not yet been created will be displayed in the "Event Type" drop-down box.



If the type of Event Notification Rule is "RequisitionStatusChanged", then it is necessary to specify each status value for which the event will trigger a notification. In the example shown, the notification will occur whenever the status of a Requisition is changed to "Approved". Multiple status values can be selected for a single rule.

If "Notify Sender/Requestor" is checked, then the user that created the Quote Request or Requisition will be notified. Note that in the context of Purchasing Event Notifications, this is not in any way related to a Work Order Requestor.

## More Program Configuration – Email Notifications for Downtime

### Setting Up Downtime Event Notifications:

Downtime Event Notifications notify users of the occurrence of events related to Equipment Downtime. First, select the type of Downtime event.

All Event Types for which rules have not yet been created will be displayed in the "Event Type" drop-down box.

Down Time Event Notification Configuration

Plant: Sacramento

Event Type: DownTimeEdited

Minimum Severity: Very High

Notify Sender

Users: chad = feedba, Charlie Huston, Christian Thom, dave hackwor

Email Address

It is necessary to specify the minimum downtime Severity for which downtime Event Notifications will occur. In this example a minimum severity of Medium has been selected so Event Notification will only occur for downtimes with severities of "Medium", "High", and "Very High." In other words, any downtimes with severities of "Very Low" and "Low" will not trigger Event Notification. The cause ALL downtimes to trigger notifications, select the least severe state--the first severity value in the drop-down box (in this case "Very Low"). The "Minimum Severity" drop-down box will always have the least severe state at the top and the most severe state at the bottom of the drop-down box. Severities are sorted from least to most severe from top to bottom of the drop-down box.

If "Notify Sender" is checked, then the user that entered the downtime will be notified.

Notify Sender

Minimum Severity:

Very Low

Very Low

Low

Medium

High

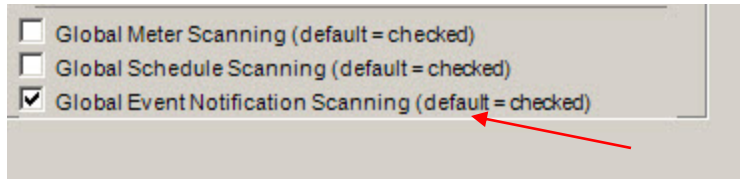
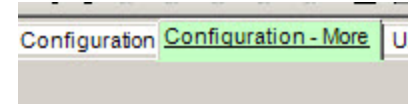
Very High

## More Program Configuration – Controlling How MaintSmart Checks for Events

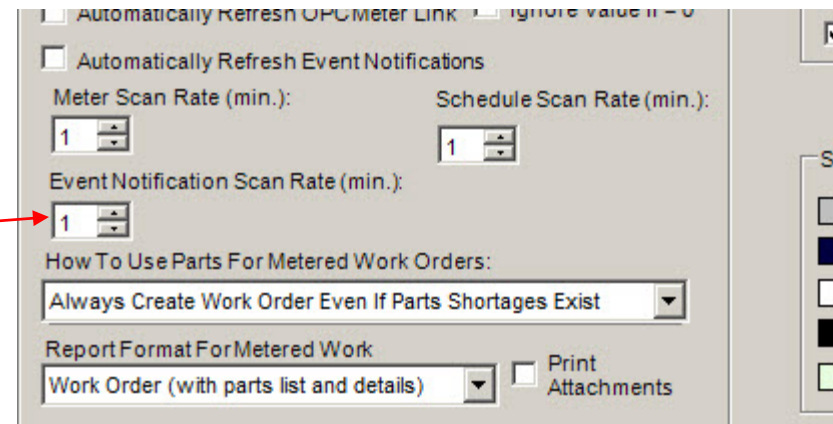
### Controlling How MaintSmart Checks for Events:

MaintSmart checks for events at a regular interval and sends emails for any events for which Event Notifications have been configured. MaintSmart administrators can control how MaintSmart checks for events from the "Configuration-More" tab on the Program Configuration Screen.

Event Notification is activated by checking the "Automatically Refresh Event Notifications" Checkbox. To set the interval in minutes at which MaintSmart checks for events enter the number of minutes in the "Event Notification Scan Rate" box.



The Event Notification Scan Rate (minutes) determines how often the program checks for events.

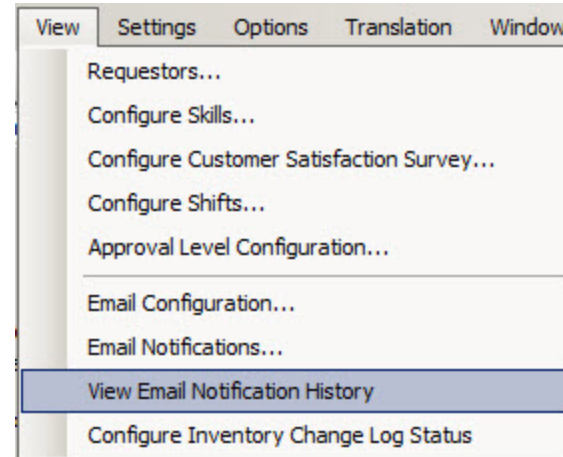
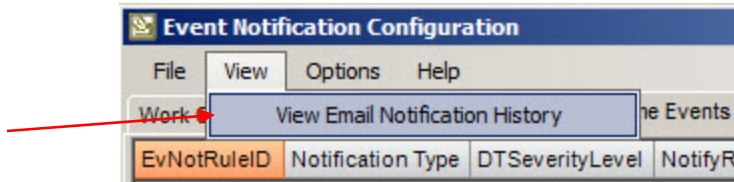




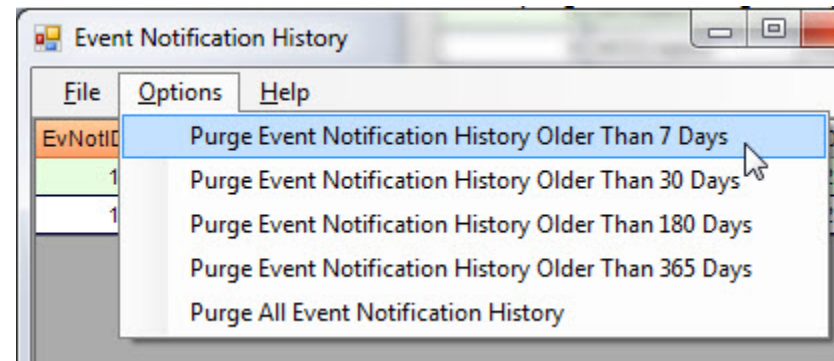
## More Program Configuration – Viewing Event Notification History

### Viewing Event Notification History:

Administrators can view the history of Event Notifications. From the Event Notification Configuration screen select the "View" > "View Email Notification History" menu item or from the main Configuration screen and select menu "View" > "View Email Notification History". The list of all Event Notification records will be displayed.



This will display the type of notification, dates, and the status of the Event Notification (Pending, Sent, or SendFail) as well as some information on the Work Order, Requisition, or Downtime that triggered the notification. The "Item ID" in the grid is the ID number of the Work Order, Requisition, or Down Time that triggered the notification.



**Purging Notification History:** As time goes on there will be many old Event Notification record accumulated and it will be desirable to purge the older ones. Old Event Notification records can be purged using the Event Notification History screen's "Options" menu. Choose the appropriate number of days past which all Event Notification records should be deleted. Only records for the current plant will be deleted or choose to delete all history. If any unsent notifications are older than the specified time they will be deleted and will never be sent. After the records are purged, a message will pop up informing you of the number of records purged.

