

Notifications

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Overview

Notifications is a ReadNow Platform feature that allows an administrator to configure the Platform to notify users when specific conditions are met.

The currently supported notification mechanism is via email. SMS notifications may be available in a future release.

Creating a new Notification

To create a new Notification:

1. Select **Administration** from the Application Menu. The menu appears with available applications.
2. Select **Administration**. The application displays at the landing page.
3. In the Left Navigation Area, select **Notifications**. The **Notifications** expand to display list.
4. Select **Notifications**. The existing Notifications display.
5. Select **New** to display the drop down and select the type of Notification to create. The appropriate Notification form appears.
6. Complete the details as described in the next sections and select **Save** to save the Notification.

Scheduled Notification

This notification type enables users to receive notifications about records on a set schedule.

Note: Scheduled notifications can be triggered manually from the **Notifications** report page. This can be done by selecting the **Run** option from the right-click context menu or the report actions menu.

Section - General

Property	Description
Type	The type of Notification. This will display Scheduled Notification after the record is saved.
Name	The name of the Notification.
Description	An optional description for this Notification.
Application	The selected application. This is used for packaging and deployment.
Enabled	This determines whether the notification is enabled.
Object	The object that this notification relates to.
Notify person	An expression that should evaluate to a Person this notification is being sent to.

Section - Source details

Property	Description
Report	The report used to select records for generating notifications.
Filters	<p>When a report is selected, this section will list any analyzer conditions that are defined on the selected report.</p> <p>Any filters that are defined only apply to the current notification and allows for dynamic filtering to be applied to the selected report.</p> <p>The Override checkbox will be shown for any configured analyzer conditions. It allow for any existing values to be overridden with local values.</p>

Section - Schedules

This section lists the related schedule records that define when the notification will be run.

The **New** button will display a drop down that allows a new schedule to be created.

Creating or modifying schedules will display a dialog that allows the schedule to be updated.

Section - Targets

The related target records that define the targets for this notification.

At the moment only Email Notifications are supported.

Creating or modifying targets will display a dialog that allows the target to be updated.

Trigger Notification

This notification type enables users to receive notifications when records are updated or created.

Section - General

Property	Description
Type	The type of Notification. This will display Scheduled Notification after the record is saved.
Name	The name of the Notification.
Description	An optional description for this Notification.
Application	The selected application. This is used for packaging and deployment.
Enabled	This determines whether the notification is enabled
Object	The object that this notification relates to
Notify person	An expression that should evaluate to a Person this notification is being sent to.

Section - Trigger

Property	Description
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Property	Description
Trigger on	<p>Choose when to trigger. Available options are:</p> <ul style="list-style-type: none"> • Create - run only when record is created • Update - run only when specified fields or relationships are updated • Create or Update - runs when record is created or specified fields or relationships are updated
Fields	Specify the fields of the selected object to trigger on.
Relationships	Specify the relationships of the selected object to trigger on.

Section - Targets

The related target records that define the targets for this notification.

At the moment only Email Notifications are supported.

Creating or modifying targets will display a dialog that allows the target to be updated.

Schedule Dialogs

Cron

Property	Description
Name	The name of the schedule.
Description	The description of the schedule.
Cron definition	The cron expression defining when the schedule will trigger. See Cron Trigger Tutorial for details regarding cron expressions.

Daily Repeat

Property	Description
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Property	Description
Name	The name of the schedule.
Days	Specify the days of the week the schedule will trigger on.
Time of day	Specify the time of the day the schedule will trigger on.

One Off

Property	Description
Name	The name of the schedule.
Description	The description of the schedule.
Date and time	Specify the date and time the schedule will trigger.

Email Target Dialog

Property	Description
Name	The name of the email target. Entries that are written to the tenant event log will show this name.
Enabled	This determines whether the email target is enabled.
Email field	Specify which text field on person object represents the email field.
Email template	Specify which email template to use.
Object variable	Select which variable defined in the email template references the object.

Property	Description
CC	Provide an expression that evaluates to a string of email addresses separated by semicolons, or that evaluates to a Person for use in the CC field.
BCC	Provide an expression that evaluates to a string of email addresses separated by semicolons, or that evaluates to a Person for use in the BCC field.
Person variable	Select which variable defined in the email template references the person.
Aggregate notifications	Specify whether to aggregate notifications. <ul style="list-style-type: none">• False - Per Notification Run: sends an email per record associated with the notification run• True - Per Notification Run: sends a a single email for all records associated with the notification run for a given person

Spreadsheet Import

A new option has been added to the spreadsheet import options called Suppress Notifications.

If this is true, trigger based notifications will not be raised during an import.

Logging

The **Sent Email Messages** report in **Administration → Settings → Email Server Settings** will list all emails that were sent from notification runs.

The tenant event log in **Administration → Audit → Event Log** will list notification run failures along with a reason for the failure.