



<h2>Managing Organization Notifications</h2>		
NBIS Release Version: 4.0	Updated Date: 05/23/2022	File ID: JA-015
Application Section: Organization Management		User Roles: Notification Manager
Applies to Organizations: Adjudication, Appeals, Continuous Vetting, Component Adjudication, Interim, Screening, SSC, FSO, Review, Authorize		
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Related Documents:		
Notification Reference Table (REF-003)		
Specific Notification Configurations (REF-004)		

Purpose: The **Notification Manager** can create notifications for a specified organization. Notifications can be sent to users within that organization or to the subjects. When a notification is created, it can be inherited (copied) by all organizations in the hierarchy below it, if the notification is enabled in the parent. Notifications *cannot* be sent to users outside your organization or to external organizations, including your parent organizations.

Types of Notifications

There are four different types of notifications that can be triggered:

- **Status/Assignment** – Alert users when a case request moves to a different status within the workflow and when a case is assigned to a user or workbasket depending on the phase.
- **Stagnant Case** – Alert users when a case has been delayed in a phase for a determined amount of time. This notification only applies to SSC, Review, and Authorize organizations currently.
- **Case Expiration** – This feature sets the timing for how long cases remain open after the standard form (SF) is received by the agency as well as the notification. Optionally, you may choose to send a case expiration reminder by entering the number of days a reminder will be sent before the case expiration. This notification only applies to SSC, Review, and Authorize organizations.
- **Organization Move** – Alert users when a team or an organization is moved internally or externally.





Notification Delivery

Notifications are delivered to users via in-system alerts or emails. This preference is configured in the user profile in the Manage Persona Settings tab of a persona.

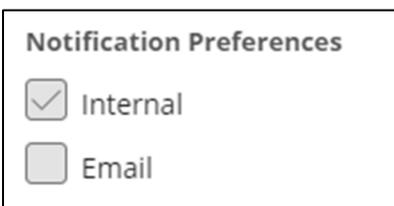


Figure 1: User Persona - Notification Preferences

In-system messages are delivered to the notification icon located in the header next to the Global Search Bar. When the notification icon is selected, a popup will appear showing the most recent 10 notifications for a user. If more are available, a **Show More** button will be displayed.

Note: Notifications that your user triggers, will not be delivered to your user, regardless of configurations.

For case related notifications within NBIS the link may be disabled if the user does not have the correct roles/permissions to view the case. The user can open the case from the notification if the hyperlink is enabled.

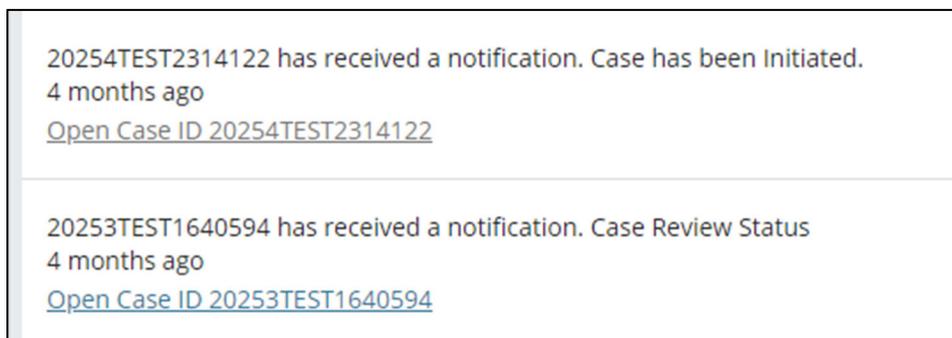


Figure 2: Enabled/Disabled Hyperlink Case Notifications

Email notifications will only display the provided information. No links to the cases or software will be provided.

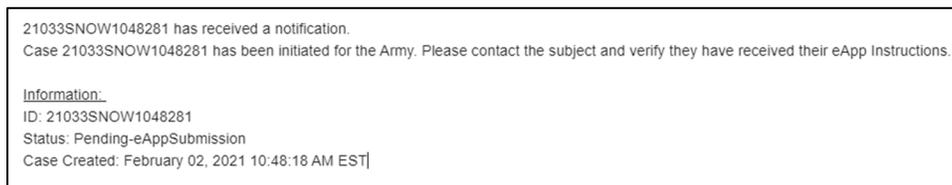


Figure 3: Email Notification





Creating a Notification

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** tab.
3. From the Configuration Menu drop-down, select **Notifications**.
4. From the Notifications main page, select the **Add Notification** button
5. Select the **Phase** for the notification.



Figure 4: Add Notification

6. Select the **Notification Type**.

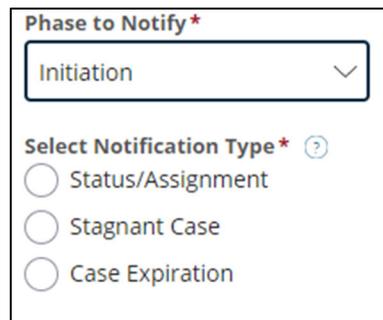


Figure 5: Phase to Notify

Note: Select **None** in the **Phase to Notify** field for the Organization Move notification type.

7. Fill in the required information:
 - a. Notification Type
 - b. Notification Name (not seen by recipients, for Organization table reference only)
 - c. When to Notify (Status for the Case that triggers the notification, for ADJ and CV organizations, this will populate based on the Workflow Builder configuration).



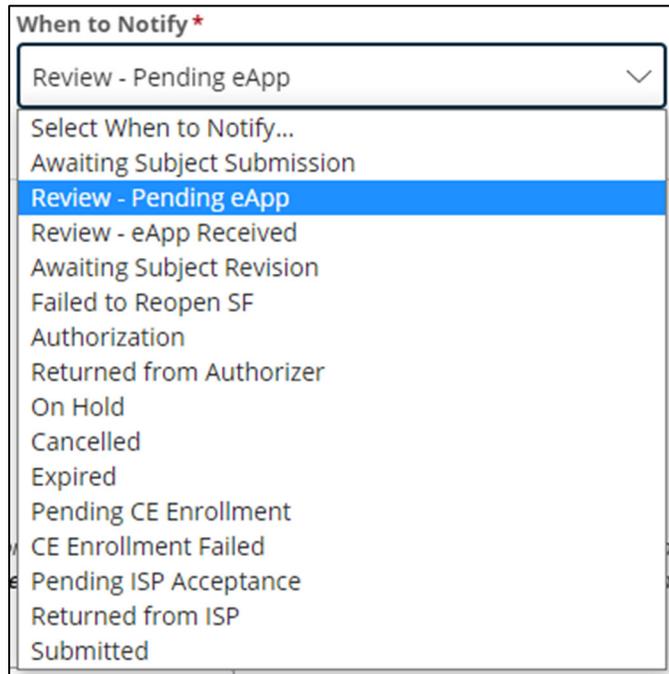


Figure 4: When to Notify Dropdown

d. Who to Notify (User(s) to notify)

Note: Selecting the Current Assignee’s Team, Last Assignee’s Team, or Organization options from the Who to Notify field, will display the Roles to Notify and User Levels to Notify fields. This will allow the Notification Manager to refine further the group of users that they want to receive the notification, based on their role and user level.

Note: User Levels do not apply to Initiate/Review/Authorize organizations.

e. Title of Notification to Recipients





f. Notification Message

Message to Recipients
 You can add case-specific information to notifications to give more context to members of your organization. The table below details how to inject variables directly into your title of notification to recipients or message to recipients.
 Example: "Please review <<ID>> updated at <<Last Update Time>>." This would translate to: "Please review CaseABC updated at January 15, 2019 12:24:05 am EST."

Title of Notification to Recipients *
 Enter Title of Notification to Recipients...

Message Text Editor *

Format - [B] [I] [U] [X] [Copy] [Paste] [Undo] [Redo] [Link] [Unlink] [Text Color] [Background Color]

Enter Message to Recipients...

Variable of Interest	Variable Format
Case ID	<<ID>>
Case Status	<<Status>>
Case Creation Time	<<Case Create Time>>
Last Update Time	<<Last Update Time>>

Figure 6: Notification Message to Recipients

8. Select **Save and Add** to create the notification.

Edit a Notification

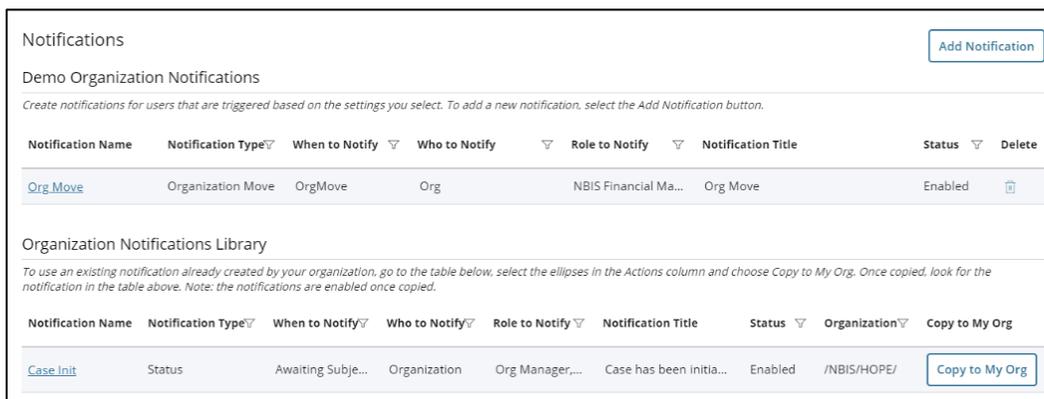
1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** tab.
3. From the Configuration Menu drop-down, select **Notifications**.
4. Select the **Notification Name** to open the details of the selected notification.
5. Select **Edit Notification** to switch to edit mode.
6. Once changes are made, select **Save** to update the notification.





Managing the Notification Tables

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** tab.
3. From the Configuration Menu drop-down, select **Notifications**.



The screenshot shows a web interface for managing notifications. It features two main sections:

- Notifications:** A table with columns: Notification Name, Notification Type, When to Notify, Who to Notify, Role to Notify, Notification Title, Status, and Delete. A row is visible for 'Org Move' with status 'Enabled' and a trashcan icon.
- Organization Notifications Library:** A table with columns: Notification Name, Notification Type, When to Notify, Who to Notify, Role to Notify, Notification Title, Status, Organization, and Copy to My Org. A row is visible for 'Case Init' with status 'Enabled' and a 'Copy to My Org' button.

Figure 7: Notifications Tables

There will be two tables displayed.

- **Organization Notifications** – Notifications enabled for your organization.
 - **Organization Notification Library** – All enabled notifications from the orgs above you in the hierarchy.
4. Select the trashcan to delete notifications in your organization.
 5. Select the **Copy to My Org** button to inherit a notification from the Organization Library. This will move the notification to the **Organization Notification** table, where you can edit further or delete if needed.

Note: For Interim and Component Adjudication Orgs, you need to open the desired notification and copy them into your organization to implement. The **Copy** button on the table will not work.
 6. Select the **Notification Name** to open the details of the selected notification.
 7. From this screen you can **Edit Notification** or **Copy to My Org** depending on which table you are viewing notifications.

