



<h2>Specific Notification Configurations</h2>	
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Purpose: Learn specifics about each type of notification and their unique configurations.

Status/Assignment Notifications

Figure 1: Status/Assignment Notification Configuration Fields

When configuring a **Status/Assignment** notification. If you choose an assignable status (i.e., Review or Authorize) the **Assignment to Notify** drop-down will appear, where you can configure a notification to trigger when a case is in a user worklist, or a specific role’s workbasket.

Table 1: Assignment to Notify Table

Assignment to Notify Value	Trigger Information
Not Applicable	This Notification is triggered when a case goes into the selected status (When to Notify), regardless of whether it was assigned to a User or a Workbasket.
When Assigning to a Person	This Notification is triggered when a case is assigned to a user and in the selected status(When to Notify).
When Assigning to a Workbasket	This Notification is triggered when a case is assigned to a workbasket (i.e. no available user for assignment currently) and in the selected status (When to Notify).





Stagnant Case Notifications

Within each **Stagnant Case** notification, you have the option to schedule three instances of notifications. For each notification, choose the recipient, and the specific role if applicable. For the first two instances, specify the amount of time you want the case to be stagnant in the phase before the notification is sent. If you choose to configure the third instance, it is preset to send the notification every 15 days for a maximum of four times, or until the case is moved out of the specific phase.

Program Tags ⓘ

Select Program Tags... ▼

When to Notify *

Select When to Notify... ▼

Notification Details

Notification Name (not seen by recipients) *

Enter Notification Name...

Status ⓘ

Enabled

First Notification

Who to Notify *

Organization × ▼

Roles to Notify *

Subject Manager × ▼

User Levels to Notify

Select User Levels to Notify... ▼

Days Before Notification *

10

Second Notification

Who to Notify

Select Who to Notify... ▼

Days After First Notification

Enter D

Third Notification ⓘ

Who to Notify

Select Who to Notify... ▼

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 - [Icons for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Paragraph, Text Color, Background Color]

Enter Message to Recipients...

Figure 2: Stagnant Case Notification





Case Expiration Notification

When configuring a **Case Expiration** notification, the **Days for Case Expiration and Notification** defines the number of days a case can be active. The case expiration (case timer) will start once the system receives a standard form. Once the case timer counts down to 0, the case will be marked as **Expired**.

Notification Details

Notification Name (not seen by recipients)* Status ?
 Enabled

Who to Notify*

Days for Case Expiration and Notification* ?

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*

Message Text Editor*

Format ☰ ☰ **B** *I* U ✂ 📄 🗑 📄 🔗 ↶ ↷ ↻ A- A-

Figure 3: Case Expiration Notification Selection

When configuring a **Case Expiration** notification, a reminder message can be sent before the expiration notification is sent.

Create a reminder notification before a case expires

Case Expiration Reminder

Who to Notify* Days Before the Case Expires*

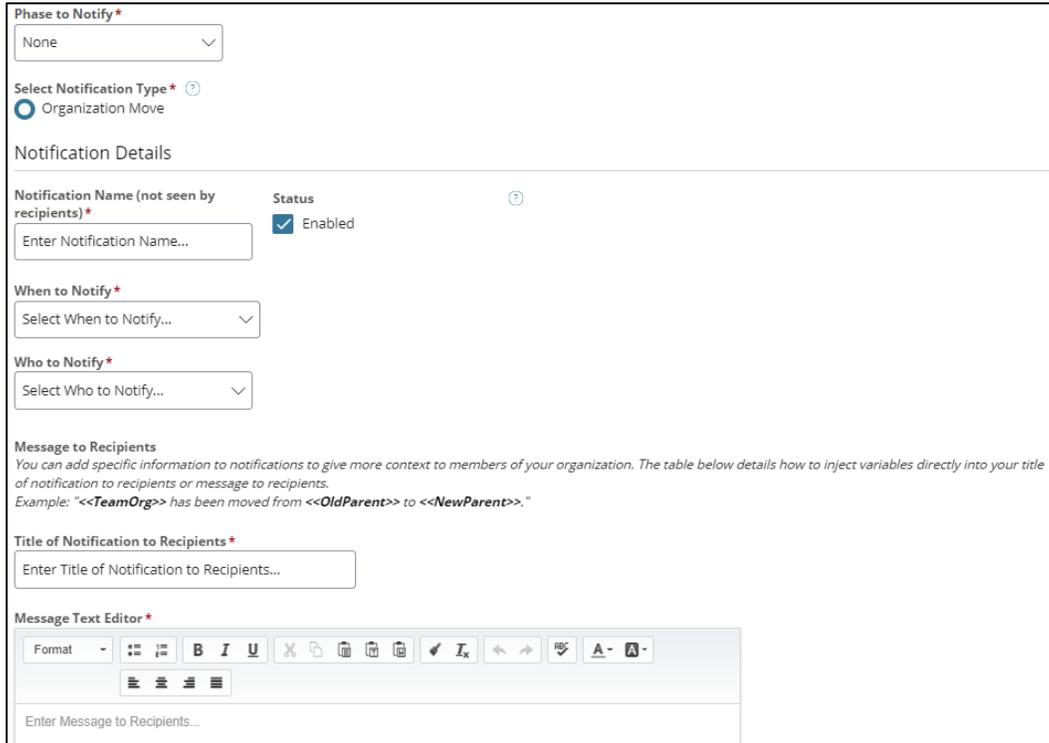
Figure 4: Case Expiration Reminder





Org Move Notifications

After selecting **Organization Move**, you can choose to trigger the notification for an organization or team being moved. If you select **An Organization is Moved** in the **When to Notify** field, the **Who to Notify** field will auto-populate to **Organization**. You will then be able to further refine the search by selecting **Roles to Notify** and **User Levels to Notify**.



The screenshot shows a web form for configuring migration notifications. It includes the following sections:

- Phase to Notify ***: A dropdown menu currently set to "None".
- Select Notification Type * ?**: A radio button selected for "Organization Move".
- Notification Details**:
 - Notification Name (not seen by recipients) ***: A text input field with the placeholder "Enter Notification Name...".
 - Status**: A checkbox labeled "Enabled" which is checked.
- When to Notify ***: A dropdown menu with the placeholder "Select When to Notify...".
- Who to Notify ***: A dropdown menu with the placeholder "Select Who to Notify...".

Message to Recipients
You can add 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: "<<TeamOrg>> has been moved from <<OldParent>> to <<NewParent>>."

Title of Notification to Recipients *
A text input field with the placeholder "Enter Title of Notification to Recipients...".

Message Text Editor *
A rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and text color. Below the toolbar is a text input field with the placeholder "Enter Message to Recipients...".

Figure 5: Migration Notification

For **External Organization Migrations**, Notifications will automatically be sent out to affected organizations. Everyone in the migrating and gaining organizations, and Organization Managers of the losing organization (parent of migration organization) will be notified.

