Presented By: Heather Judd - Business Analyst

Notifications, Distributed Reports/Searches, & Discussions - oh my!

Managing Alerts through Action Notifications, Distributed Reports & Searches, and Discussions



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Notifications

How to set up and you can now add an attachment to the notifications

Distributed Reports & Searches

Saved searches can be distributed as reports or searches to users

Discussions

What they are and how to use them

Questions?

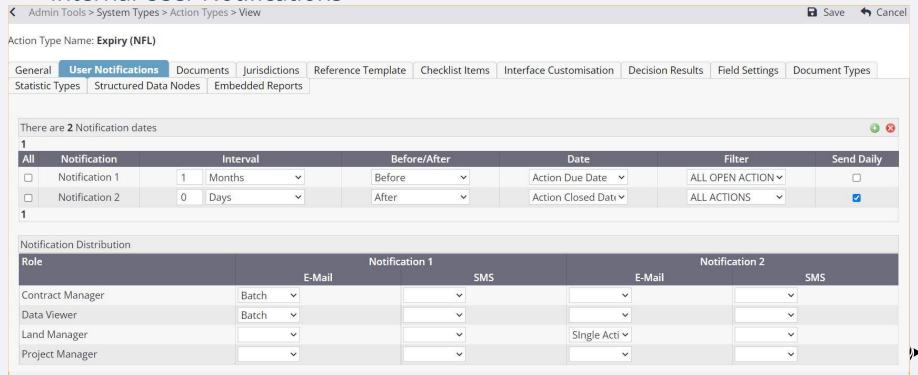
Any general questions regarding Notifications, Distributed Reports and Discussions, & Discussions



- Notifications alert and remind Users and Parties in Landfolio of upcoming obligations, responsibilities, or progress on workflows such as due dates on licenses or parcels.
- Notifications are sent from Landfolio via Email or as SMS messages.
- Note that User Notifications can be based on the following:
 - Action Closed Date
 - Action Creation Date
 - Action Due Date



Internal User Notifications



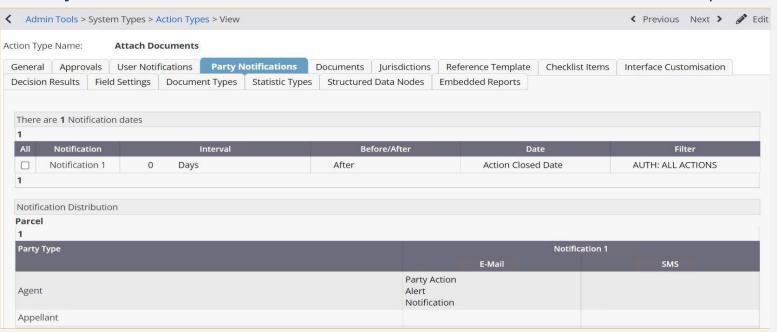
Internal User Notifications - Set daily Notification in your "My Settings"

Contact Details Receive daily notifications at: 07:00 Preferences Current time zone: GMT -04:00 Notifications Batch email notifications report template: Default Batch E-Mail Action Notification Schema template:	∢ My Settings			Ø Edit
Preferences Current time zone: Batch email notifications report Default Batch E-Mail Action Notification Schema template:	Heather Judd			
Notifications Batch email notifications report Default Batch E-Mail Action Notification Schema template:	Contact Details	Receive daily notifications at:	07:00	
template:	Preferences	Current time zone:	GMT -04:00	
Soarches template:	Notifications		Default Batch E-Mail Action Notification Schema	
Searches	Searches	template:		
User Groups	User Groups			



External Party Notifications

Party Notification tab allows automatic distribution of notifications to external parties





Notification Templates

Batch Notification Templates

```
-</head>
=<body>
<h1>Landfolio</h1>
<h2>Action Notification</h2>
<br/>(b)[[General|Todays Date|Format:dd MMM yyyy]]</b>
<br />
<br/>(b)[[user|full name]] ([[User|Email]])</b>
<br/>b>Actions scheduled for notification today:</b>
[[User|Notification List|notification date:today]]
   Code
     Name
     Type
     Date Due
     Days<br />Remaining
     Action
     Responsible Person
    <d href="[[Application URL]]/Hook.aspx?Hook=AssociatedObjectDetail&AssociatedObjectID=[[Associated-Object ID]]">[[Code]]</d>
     [Name]]
     [[Associated-Object Object Type]]
     [[Date Due|Format:dd MMM yyyy]]
     [[Days Remaining]]
     <a href="[[Application URL]]/Hook.aspx?Hook=ActionDetail&ActionId=[[Action ID]]">[[Action Type]]</a>
     [[Responsible User]]
    -</body>
-</html>
```



Notification Templates

• Batch Notification Templates

FlexiCadastre Action Notification

12 Nov 2013

Vuyokazi (vuyokazi nogilana@spatialdimension.com)

Actions scheduled for notification today:

Code	Name	Туре	Due Date	Days Remaining	Action	Responsible Person	Responsible Person Job Title	Comment
0 0001Vuyo	322_License Name	License	12 Nov 2013	0	Application	Vuyokazi	General Manager	Today is the day wooohooooo
3002	ASHMORE (NSR)	Group	12 Nov 2013	0	Application	Vuyokazi	General Manager	Test



Notification Templates

Individual Notification Templates

```
</style>
-</head>
Octobration (table)
    <span class="style3">Landfolio<br />
               </span><span class="style4">User Notification</span>
          [[General|Todays Date]]
    This email notification is to let you know that the [[Action|Action Type]] action on agreement [[Agreement|Code]] was closed today.
      This action was closed by user [[Action|Agreement|Land Manager]]
      <br />
 </body>
 </html>
```



Notification Templates

Individual Notification Templates

Landfolio

User Notification

Oct/02/2022

This email notification is to let you know that the Expiry (NFL) action on agreement 018130M was closed today. This action was closed by user Heather Judd



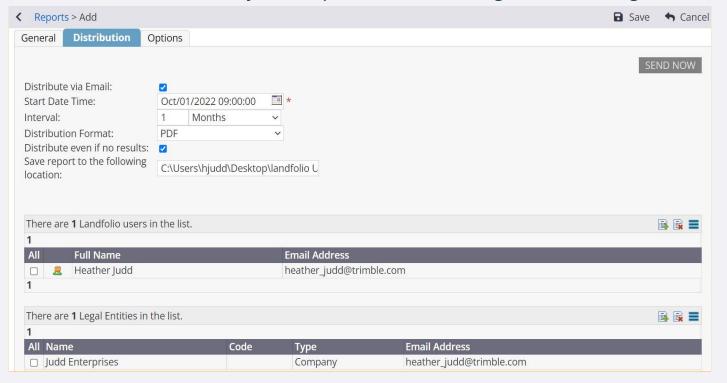


Notifications Demo



Distributed Reports

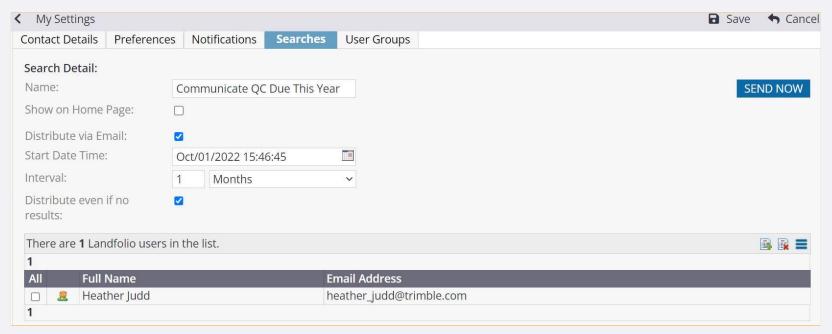
Automated distribution of system reports to Users or Legal Entities using email





Distributed Searches

Saved Searches set up to be distributed by email through hyperlinks





Distributed Reports & Searches Demo



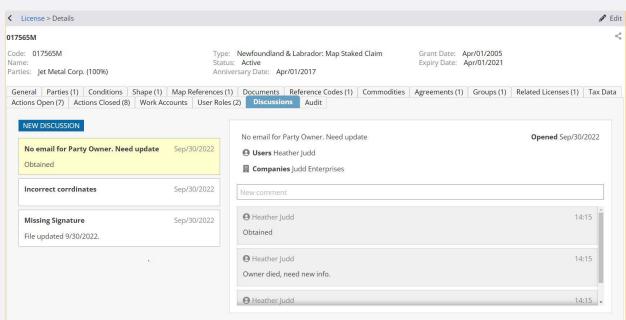
Discussions

Provides an interface to make comments and discuss topics related to the Asset or

Action

These can be attached to:

- Licenses
- Agreements
- Groups
- Actions





Discussions

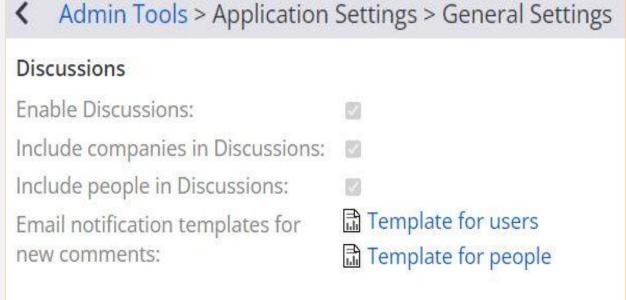
Internal users and External parties can receive notification alerts when comments are

added to discussions.

• Participants can include:

- Internal users
- External People
- External Companies

- Users Heather Judd
- People Heather Judd
- Companies Judd Enterprises





Discussions Demo



Questions?





Thank You

For Questions or Feedback please contact: heather_judd@trimble.com

