



# Notifications: Creating notifications

## Understanding Notifications

Using Triggers combined with email templates, notification emails can be sent

- [Project Roles](#), i.e. all users within a Project Role
- Reporter, i.e. the user who submitted the issue
- Handler, i.e. the user the issue is currently assigned to
- Email address, i.e. a specific email address
- Form field, i.e. an email address or user selected within the form

Notifications are sent based on [triggers](#), typically when issues are reported, the [status](#) of an issue is changed or notes are added to an issue.

Notifications may be sent using the default template or a custom template. Custom templates can be configured as either plain text or HTML.

Expressions can be included in both the subject and the body of custom templates:

- {notif:header} - header of notification (for example, "Ticket has been UPDATED")
- {project:name} - name of the project
- {link:view\_issue} - url of "view ticket" page
- {link:update\_issue} - url of "update ticket" page
- {link:change\_status:STATUS\_NAME} - url to change status of ticket to STATUS\_NAME
- {link:approve\_status:STATUS\_NAME} - url to approve status changing to STATUS\_NAME
- {issue:\_id\_} - ID of issue
- {issue:\_id\_in\_project\_} - ID in project (with prefix),
- {issue:\_status\_} - current status
- {issue:\_assigned\_} - current handler
- {issue:\_reporter\_} - ticket reporter
- {issue:\_created\_} - date of creation
- {issue:\_last\_modified\_} - date of last modification
- {issue:\_traffic\_light\_} - traffic light (if SLA is used)
- {issue:FIELD\_SYMNAME} - value of field of ticket's form
- {issue:\_notes\_} - notes of ticket
- {issue:\_history\_} - history of ticket

## Example

I start with a [trigger](#) called *New Ticket Submitted*

From Admin > Infocapture > (my project) > Notifications, I click 'Add New Template'.

I write the following in the body of the template:

A new ticket, {issue:\_id\_in\_project\_}, has been submitted by {issue:\_reporter\_} at {issue:\_created\_}  
Its current status is {issue:\_status\_}  
You can view the ticket here: {link:view\_issue}

Once sent, the parts of the template seen in curly brackets will be automatically replaced with the requested information. This template would look like this once sent to the user:

A new ticket, SFTY0010, has been submitted by Jon Mulhern at 13-08-2018 15:08  
Its current status is New  
You can view the ticket here: <https://mulhern.claromentis.net/forms/safetyform/view/SFTY0010>

Now that I have a template and a trigger, I can click "Add New Rule" to setup a notification like so:

The screenshot shows a web form titled "Add new rule" with the following sections and elements:

- Trigger:** A dropdown menu with "New ticket submitted" selected, marked with a red circle containing the number 1. Below it is a button labeled "Add new trigger" with a plus icon.
- Notifications template:** A dropdown menu with "New ticket template" selected, marked with a red circle containing the number 2.
- Send notifications to:** A section with three radio button options: "All users" (unchecked), "Submitter of ticket" (checked, marked with a red circle containing the number 3), and "Ticket handler" (unchecked).
- Also send to email address:** A text input field containing "jon.mulhern@claromentis.com", marked with a red circle containing the number 4.
- And the form field:** A dropdown menu with "User Select" selected, marked with a red circle containing the number 5.
- Bottom:** A button labeled "Add/Change rule".

1. Choose the trigger that should send the email.
2. Choose the template you have created. You have the option of using a 'Default' template, which will be described in more detail in a separate article.
3. Choose the project role(s) to notify. The email will be sent to all the users in the role(s) you select - remember that these roles are created and defined in the *Project Permissions* screen.
4. You can also specify email addresses here if you want to ensure that there is one address that

will always be sent an email. This is useful for notifying those who are not on your intranet (such as external users), team distribution lists, and other responsible individuals who are not in a project role.

N.B. Whereas picking a project role (3) or a user select (5) check that the stated users do have permission to see form content before sending an email, this function does not. More described below.

5. If you have a user picker on your form, you will see it here. This is useful if your form has a field where the user states their manager, and you wish for that manager to be notified.

## Permissions checking

If you have made use of *Field Visibility* (aka *Field Permissions*) then Infocapture will check that the recipient has permission to see all the form content that is meant to be included in the email. If they do not have permission to see everything, the email will not be sent. There is one exception - if you have used the "also send to this email" field (number 4 in the list above), which makes no such checks.

As an example:

I have an email template that contains a field from the form called **total approved amount**. I have a notification rule to send this to both of my project roles, called **all users** and **managers**.

Within *Field Visibility* I have set a rule that if the status is **awaiting approval**, those in **all users** cannot see the **total approved amount** field but those in **managers** can.

If a ticket is submitted and its initial status is **awaiting approval**, the notification will send to managers but not all users.

This is because those in the all users don't have permission to see what's trying to be shown in the email template, so the notification is suppressed.

If a ticket is submitted and its initial status is something else, then the notification *would* go to all users. There is no Field Visibility rule restricting the view of that form field, so they're allowed to see the template. Everyone gets the email.

## Priority

It is worth knowing that every time a form is submitted, or edited and saved, the notification rules will be checked.

Any user will receive just one notification even if the rules show that they should in theory receive multiple notifications.

There are 5 kinds of notifications, which are listed in order of priority below, highest first:

1. Custom notification to the handler
2. Custom notification to the reporter
3. Custom notification to a project role
4. [Default notification](#) sent to those who are monitoring the issue
5. [Default notification](#) sent to the handler and reporter based on personal settings

If an action would trigger multiple notifications to one user, only the notification with the highest priority order would be sent. To reorder notification rules, use the up/down arrows:

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# Recommended next article: Default Notification Templates

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