

Configuring Email

Email is used to notify the selected identities that an item has either entered a specific life cycle state, or that it is in transition between states. So, for both the state and the transition, the configuration dialog is the same.

Configure E-Mail

E-Mail Message

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Hidden

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	Name	From User [...]	Subject	Body Plain [...]	Body Html [...]	Query String [...]	Of Itemtype [...]
⚙	SSVC Notifica...	Innovator Ad...	Visual Collab...		<table border...		

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Next >

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1 Results

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The top part of the dialog allows for the message itself to be specified. Users can have more than one message specified, if users want a different message to be sent to different identities. In the bottom part of the dialog, specify which identities will receive the message currently selected in the top pane.

Selecting a configured e-mail:

1. Click the Configure E-Mail link in the Life Cycle map selected. The Configure E-Mail dialog box appears.
2. Click the Add E-Mail message button null . The Email Message search dialog appears.
3. Click the Run Search button null to see a list of previously configured emails.

Select Items

□ ×

✉ E-Mail Message ▾

🔍  Simple ▾

	Name	From User [...]	Subject	Body Plain [...]	Body Html [...]	Query Strin...
▼		...				
	SSVC Notific...	Innovator Ad...	Visual Collab...	<table border=...		
	Express EDR...	Innovator Ad...	\$(Item[2]/ite...	<BODY><fon... <Item type="...		
	CM Activity N...	Innovator Ad...	New Innovat...	<BODY><fon... <Item type="...		

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OK Cancel

4. Select a message type and click null . The pre-configured email is added to the list.

A new line is created in the top pane. The following table describes the properties:

Property Description

Name	The name of the e-mail message itself
From User	The identity from whom the message will be sent. If none is specified, the identity configuring the e-mail notification will be used. Hit F2 to bring up a search dialog with all available identities. The chosen identity must have a valid e-mail address.
Subject	The subject line of the e-mail.
Body Plain	Plain text version of the message to be sent (for recipients who do not accept HTML)
Body HTML	HTML version of the message to be sent
Query String	If a user wants to write complex notifications, that require data from various items in Innovator, a query can be written to request this data from the database. The retrieved data can then be referenced in the body of the e-mail message. For example, to show values of a related item in the e-mail message, a query will be written to retrieve it. To learn how to write these queries, please refer to the Advanced Programming course, or contact an Aras Consultant.

5. Click the Add Identities button in the Identities section of the dialog to specify existing identities that will receive the e-mail (make certain that those identities have a valid e-mail address). Click



the New Identity to add an identity. The Identity search dialog appears.

Select Items

Identities

Simple

	Name	Description	Is ...	Classification

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25

OK

Cancel

6. Select the identities to receive the email and click null to add them.

Creating a Configured email

Use the following procedure to create an email:

1. Click on the Configure Email link in the LifeCycle Map that have been created/selected. The Configure E-Mail dalog appears.
2. Click the New Email button to create an email. A row is added to the dialog box.



Configure E-Mail



✉ E-Mail Message ▾ ☆

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	Name	From User [...]	Subject	Body Plain [...]	Body Html [...]	Query String [...]	Of Itemtype [...]
							
	SSVC Notifica...	Innovator Ad...	Visual Collab...	<table border...			

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🧬 Identities ▾ ☆

   |   Hidden ▾ |  ▾  ▾  ▾

	Name
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3. Enter a name for the email in the Name field.
4. Double-click the From User cell and click the ellipses button to select the users to associate with the email. The User search dialog appears.



Select Items



Users ▾

	Login Name	First Name	Last Name	Employee #	Manager [...]	Email	Telephone	Cell	Fax
▼					...				
	admin	Innovator	Admin						
	Andy George	Andy	George						
	authadmin	Authentication	Admin						
	esadmin	ES	Admin						
	jDesign	Joe	Designer		Innovator Admin	jDesign			

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OK

Cancel

5. Select usernames to associate with the email and click null .

Using Variables in Email Text

Users can use variables in the e-mail text to identify the exact item and its property values, making the e-mail message more specific. Users can insert any item property using the syntax `${property name}`, including system properties. There are also the following runtime variables supported in Innovator:

Variable Definition

`$(USER)` The current logon name

`$(ALIAS)` The alias identity of the user

`$(DATE)` String containing today's date

`$(TIME)` String containing the current time

Here is an example. We have an item with the following properties: name, part_number, and color. It also has the usual system properties, and we will use the property state to indicate which life cycle state the item is entering. An e-mail message could be configured as shown below. If a user right clicks on the e-mail row and select View "Email Message" from the pop-up menu, an email message in a separate window, as shown here.



Part x SSVN Notification x

SSVC Notification

Save Done Discard [Refresh] [Undo] [Share] [Chart] [Link] [More]

Email Message

Name
SSVC Notification

From User
Innovator Admin

Subject
\${name} is in state \${state}

Body Plain
The item name \${name}, part number \${part_number} has entered the life cycle state \${state}. The following action needs to be taken:

Body Html
<table border="0" cellspacing="0" cellpadding="0" id="templateContainer" style="font-family: Arial,Helvetica,sans-serif; max-width: 600px">

Query String

Notice the use of two variables in the subject line - \${name} and \${state}. Please make sure to use the property names, not labels. The Body of the message is using the additional property \${part_number}.