DICE Products & Technical Documentation

Notify Lists and Paging

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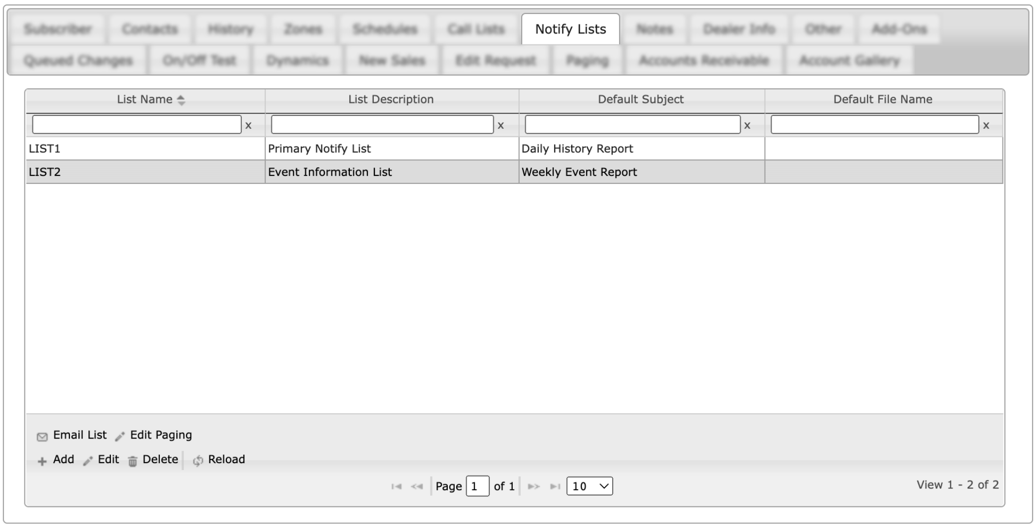
Notify Lists and Paging

The **Notify Lists** and **Paging** tabs within Data Entry and Caller Assistance are where users manage notification parameters and preferences assigned to contacts on the account. This documentation will instruct users on how to use the available tab options to manage notify lists and paging functionality on subscriber accounts.

Notify Lists

The **Notify Lists** tab is where users define lists of contacts who should be notified regarding specific information or events on the account (Figure 1). Users can define notify lists on Zones, Reports, and other pages throughout Matrix. Once defined, the system will email/notify contacts accordingly. More information on assigning notify lists can be found within the pages' respective documentation.



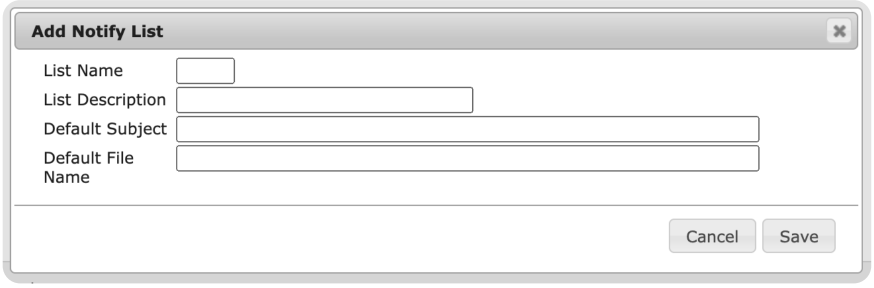
(Figure 1)

Users can interact with the Notify Lists table via the available toolbar options. These options are defined below.

Option	Function
Email List	Allows users to assign contact email addresses to the selected notify list. More information on email lists can be found below.
Edit Paging	Allows users to determine the information contained within pages sent to applicable contacts. More information on editing paging can be found below. For more information on managing paging permissions on contacts, see the documentation available here.
Add	Allows users to create new notify lists. More information on adding lists can be found below.
Edit	Allows users to update existing notify lists.
Delete	Removes the selected notify list from the account.
Reload	Refreshes the table to display up-to-date information.

Add

Selecting Add from the toolbar will display the **Add Notify List** dialog box (Figure 2).



(Figure 2)

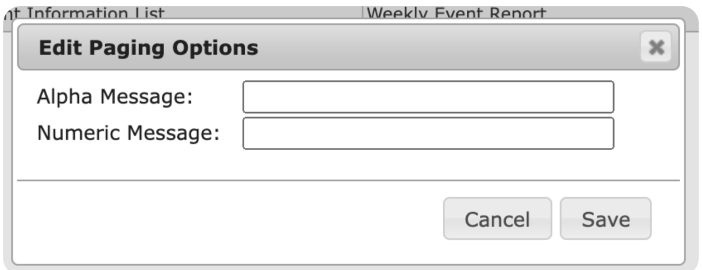
Perform the following steps to add a new notify list to the account.

1. Input a short identifier for the list into the **List Name** field.
    - This field can contain a maximum of five alphanumeric characters.
    - **Please Note**: Once saved, the list name *cannot* be updated.
2. Input a brief explanation of the list into the **List Description** field.
3. Input the information that will populate the **Default Subject** field with what should populate the email subject line for any emails sent from this notify list.
4. If applicable, input the name that will be assigned to any files attached to emails into the **Default File Name** field.
    - **For Example**: If any history or alarm documents are attached to notify list emails, this is the name that will automatically be assigned to the file.
5. Select **Save** to complete creating the notify list.
6. Repeat the above steps as necessary to create additional notify lists.

Once notify lists are created, users can assign emails and paging notification parameters. See the below documentation for instructions on completing notify list setup.

Edit Paging

Selecting Edit Paging from the toolbar will display the **Edit Paging Options** dialog box for the selected notify list (Figure 3).



(Figure 3)

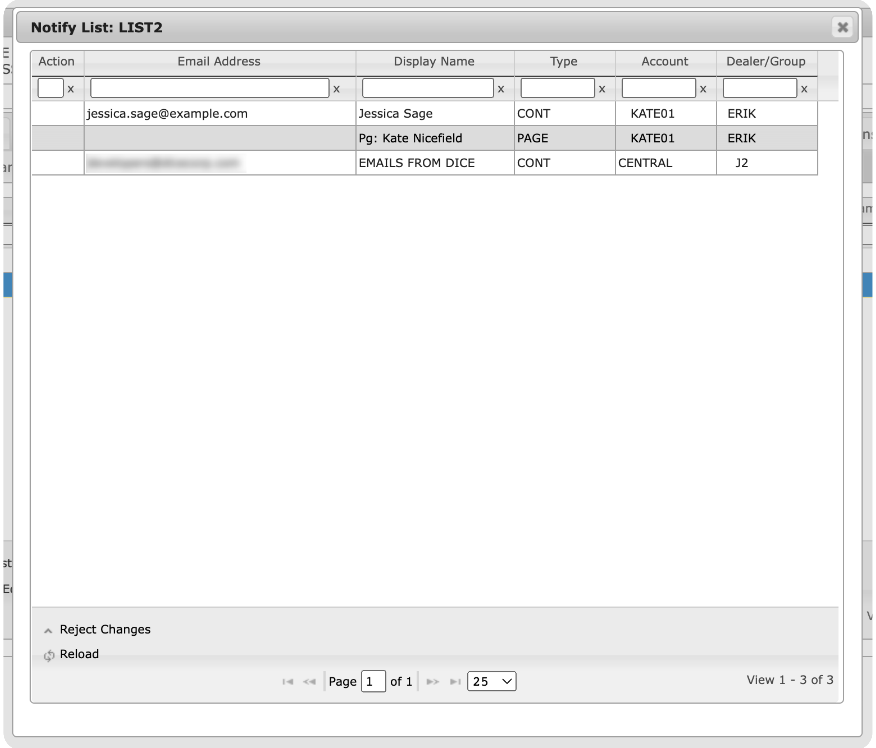
Perform the following steps to add paging options to the list.

1. Input the message text that will display into the **Alpha Message** field.
2. Input the message digits that will display into the **Numeric Message** field.
3. Select **Save** to complete assigning paging information to the notify list.

When contacts configured to receive page notifications are notified, the applied message information will display on their pager.

Email List

Selecting Email List from the toolbar will display the **Notify List** dialog box (Figure 4).



(Figure 4)

Perform the following steps to assign email addresses to the list.

1. Select all contacts who should be notified via email (or page) from those displayed.
    - Selecting a contact multiple times will update the contact's **Action** status. The available statuses are defined below.
        - **To**: Default action used to send the email directly to the selected address. Typically, the primary individual receiving the email.
        - **Cc**: Carbon copy, used for any additional contacts who should receive the email. Typically, any secondary individuals who should receive the email for reference or general knowledge.
        - **Bcc**: Blind carbon copy, used for any additional contacts whose inclusion should be hidden from all others included on the email. Typically for parties whose email address shouldn't be shared with the remaining individuals.
        - **Pg**: Page, used for any contacts who are configured to use Paging on the account. For more information on configuring contacts to be notified via page, see the documentation available here.
2. Exit the dialog box once all appliable contacts are properly configured.

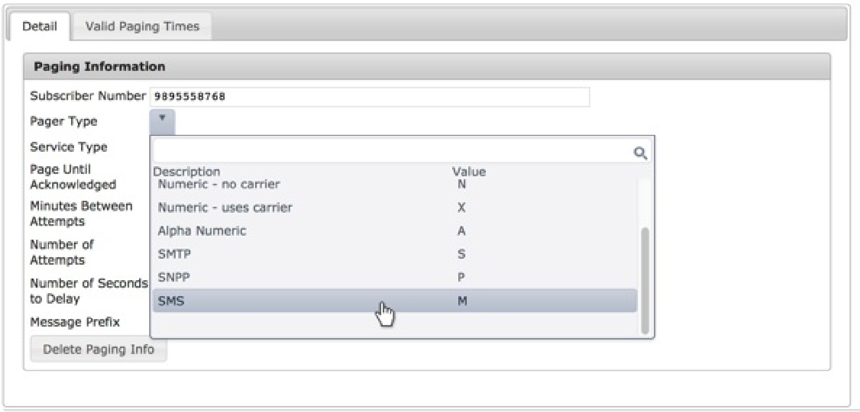
Once selected, the notify list will email or page applicable contacts as necessary.

Paging Notify List

The following instructions describe how to create a **Notify List** for paging, including how to add paging on a **Contact**.

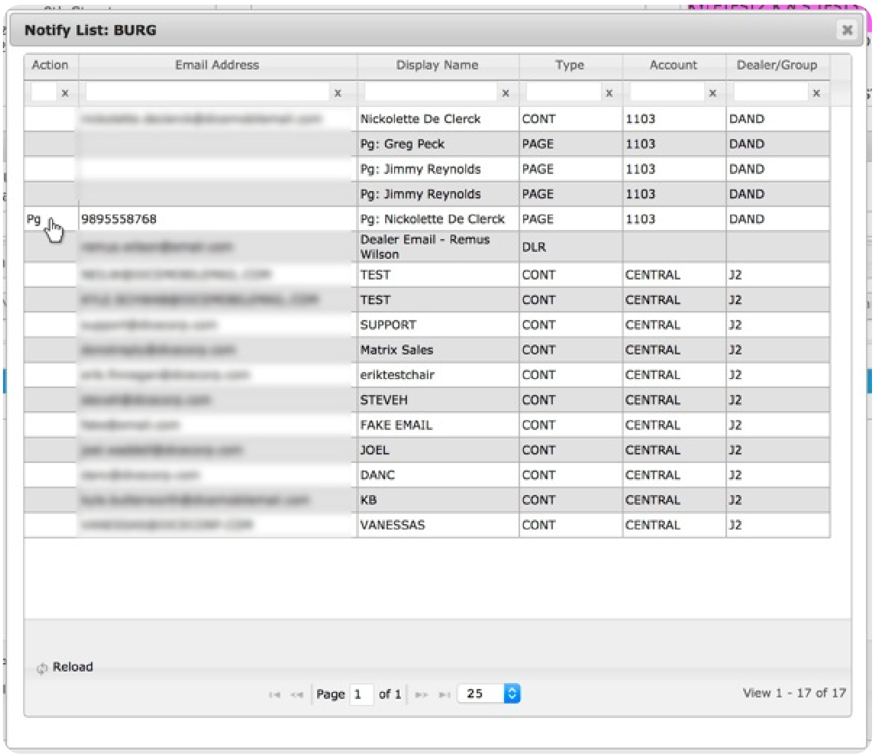
Perform the following steps to add a pager to a contact, add that contact to a notify list, and add that notify list to a Notify by Type:

1. Select a contact from the **Contacts** tab.
2. Select **Edit** to open contact details.
3. Select the Paging Detail tab.
4. Enter the pager number in the **Subscriber Number** field.
5. Select **SMS** from the pager type drop down (Figure 5).



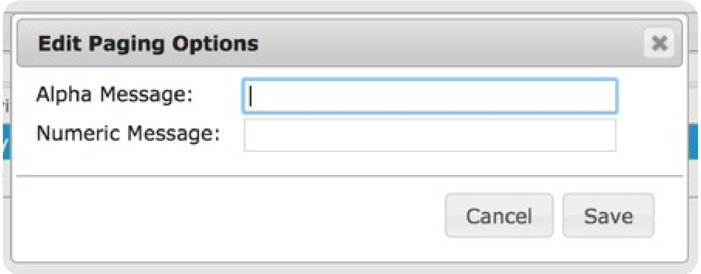
(Figure 5)

6. Select Save All to save the pager information. Close the contact details dialog box.
7. Select the Notify Lists tab.
8. Select **Add** to open **Add Notify List**.
9. Input a name for the notify list in the List Name field. This name can be up to five characters long. Enter a description of the Notify List in the List Description field. **Leave Default Subject** and **Default File Name** blank unless you would like to override the default.
10. Select **Save** to save the new notify list.
11. Select the new notify list from the grid and select **Email List** to open the list of contacts that can be added to the notify list.
12. Each contact is labeled by type. Only contacts with the type **PAGE** can be paged. Click the **Action** column cell for the corresponding row to change the action to **Pg** (Figure 6). Once your contacts have the appropriate actions applied, close **Notify List: [NAME]**.



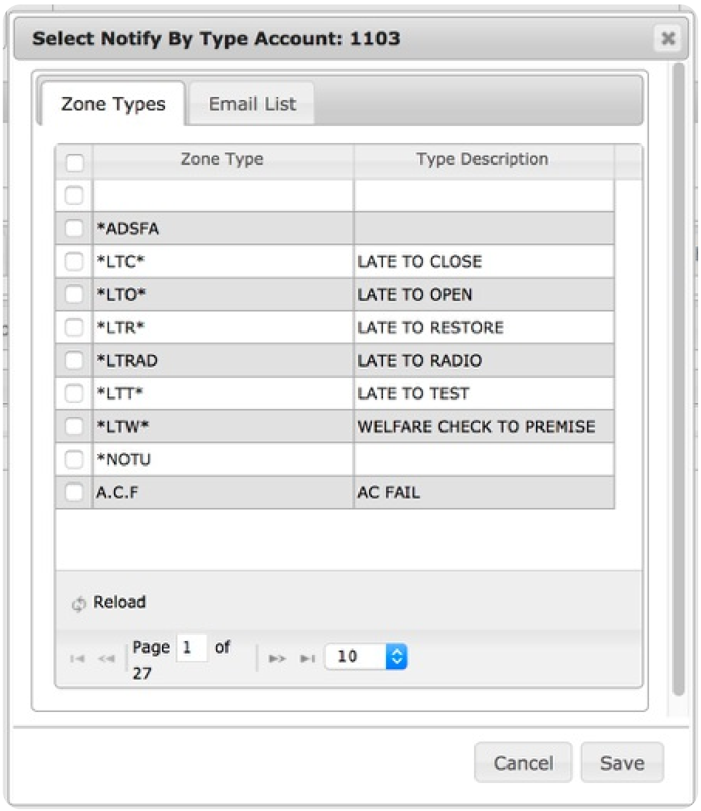
(Figure 6)

13. Once contacts have been set up to receive pages as part of a notify list, the message paged must be customized. Select **Edit Paging** from the toolbar to open **Edit Paging Options** (Figure 7). This dialog box has two separate fields: one for the alpha message and one for the numeric message. The **Alpha** field is used for all types of pagers *except* those labeled *numeric* in the **Pager Type** drop down in contact details.



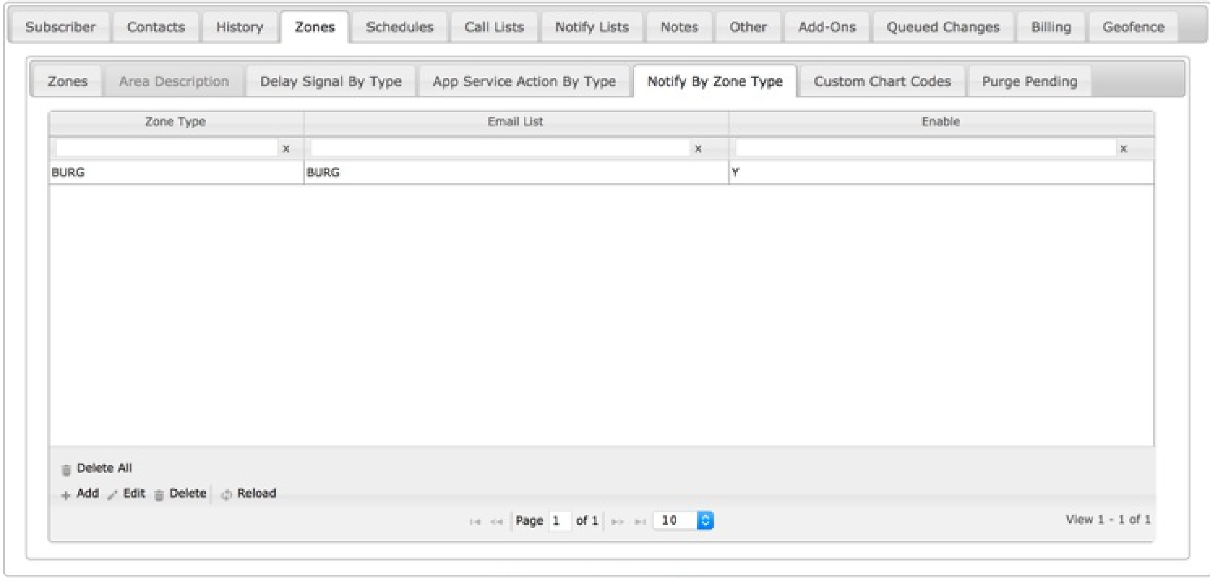
(Figure 7)

14. Input a message in the designated field. The number of characters that can be sent to a pager is restricted by the device itself. If this device can only receive pagers with messages up to 30 characters long, only the first 30 characters of the message will be sent. This field also accepts **tags**. Tags are used in our software to reference a specific variable. For example, if the tag %a% is used, when a page is sent to a contact, that **%a%** will be replaced with the **account number**. The tags and variables they reference are listed in the table below.
15. Select **Save** to save the pager message.
16. Go to the **Zones** tab and then to the **Notify by Zone Type**.
17. Select Add from the toolbar to open **Select Notify by Type Account: [ACCOUNT NUMBER]** (Figure 8).



(Figure 8)

18. Select one or more zone types to send a notify on.
19. Select the **Email Tab**. Use the magnifying glass to the right of the email list field to open the list of email lists.
20. Double click the email list you created with the new pager to populate the **Email List** field. The **Activate** drop down decides where the email list was set up. By default this drop down is set to Both, which means it will be active on both this account and the dealer/subdealer. Select **Level** from the drop down for this notify by type to only be active on this level (in this case, the account). Select **Subscriber** from the drop down for this notify by type to be active on the subscriber level only. Because this notify by type is being set up on the subscriber level in the first place, both the **Subscriber** and **Level** selections result in the same outcome.
21. Select **Save** to save the new Notify by Type (Figure 9). As long as this notify by type is enabled, type **BURG** signals will send a notification to the contacts on the email list.



(Figure 9)

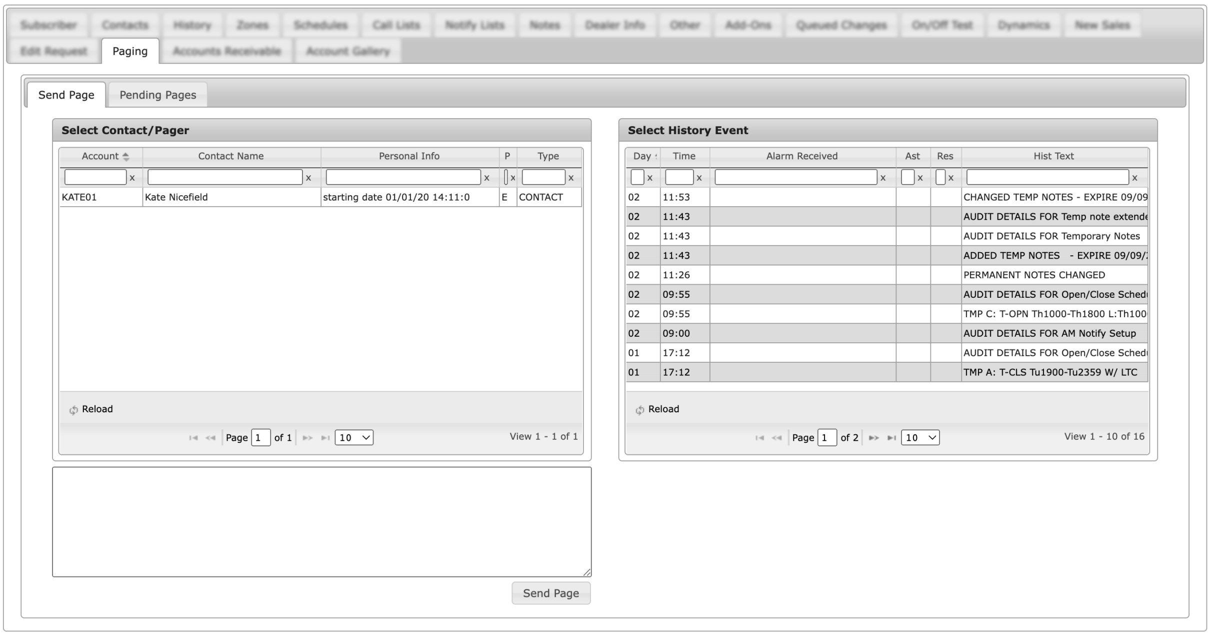
Tags

Tag	Variable
%a%	Account number
%ed%	Event description
%ad%	Area description
%ud%	Username/description
%tt%	Test time
%lt%	Last test time
%zn%	Zone/signal
%nl%	Force new line
%?%	Conditional message
%st%	Event time in HH:MM
%t%	Event time in HH:MM for the local time zone
%an%	Company name
%z%	First zone
%zd1%	Signal description
%cc%	SEIA code
%zd2%	SEIA message
%zd3%	SEIA zone
%p%	Local phone number
%p800%	Central station's toll-free telephone number
%tk%	Service ticket number

%pr%	Service ticket priority
%id1%	Subscriber identifier #1
%id2%	Subscriber identifier #2
%id3%	Subscriber identifier #3
%id4%	Subscriber identifier #4/key number
%id5%	Subscriber identifier #5/geocode
%cty%	Subscriber city
%sta%	Subscriber state
%zpc%	Subscriber zip code
%deal%	Dealer number
%dn%	Dealer name
%amd%	AM Notify description
%typ%	Signal type
%adr%	Subscriber address (including street number, street name, and second line of address information if applicable)
%inv%	Invoice number and type
%cdt%	Current date
%ar%	Accounts receivable number
%brn%	Branch name
%tch%	Tech assigned to service ticket
%rsc%	Alarm resolution
%rsd%	Resolution description
%rst%	Resolution type
%tkd%	Service ticket description
%apd%	Service ticket appointment date

Paging

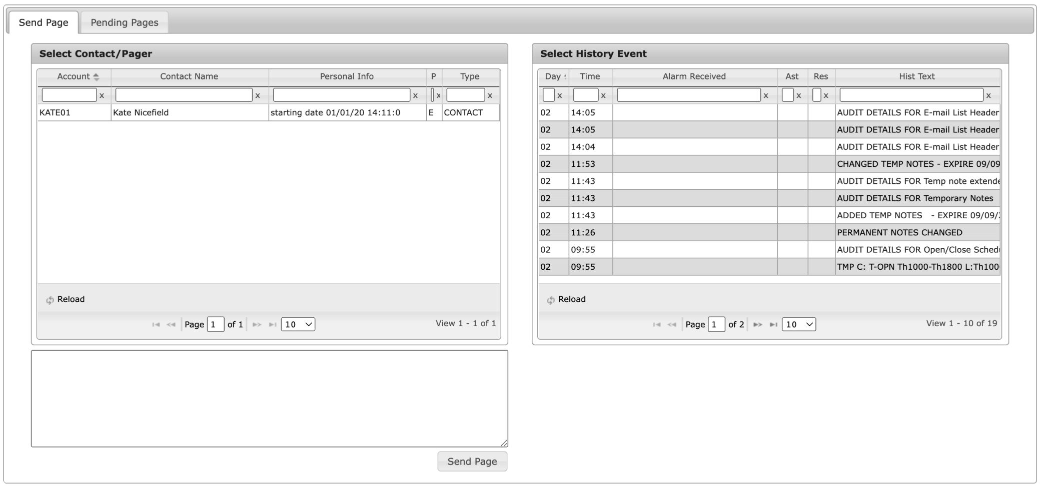
The **Paging** tab is where users view and send page notifications (Figure 10). From this tab, users can send pages immediately and check the status on any pending pages. This documentation will instruct users on how to send and manage pages.



(Figure 10)

Send Page

The **Send Page** subtab is where users can immediately send information to contacts configured to receive page notifications (Figure 11).



(Figure 11)

Perform the following steps to send a page.

1. Select the contact who should receive the page from the **Select Contact/Pager** table.
2. If applicable, select a history event from the **Select History Event** table.
3. Input the message text into the available text field.
4. Select **Send Page** to complete sending the information to the selected contact.

The selected contact will receive the page information momentarily. Repeat the above steps as necessary to send additional pages.

Pending Pages

The **Pending Pages** subtab is where users can view all pages queued for delivery.

Users can interact with the Pending Pages table via the available toolbar options. These options are defined below.

Option	Function

Answer Page	Assigns the page to the user within Monitoring. When in Monitoring, the system will prompt the user to handle the selected page.
Cancel Page	Removes the page from the sending queue. The page will no longer deliver to the contact.
Reload	Refreshes the table to display up-to-date information.