DICE Products & Technical Documentation

Fax/Email

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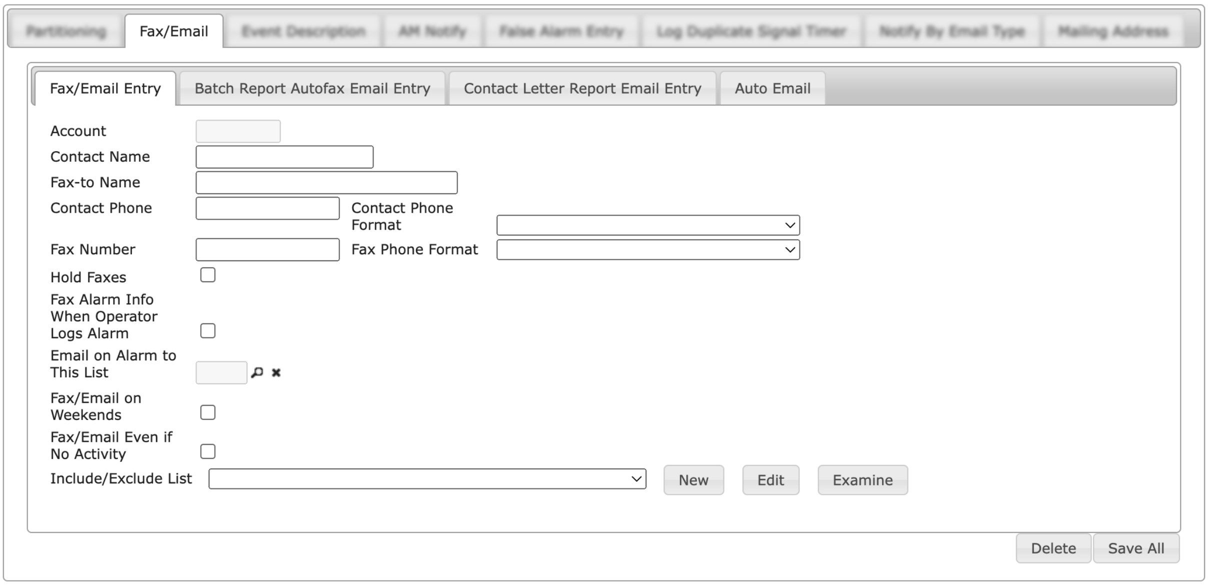
Fax/Email

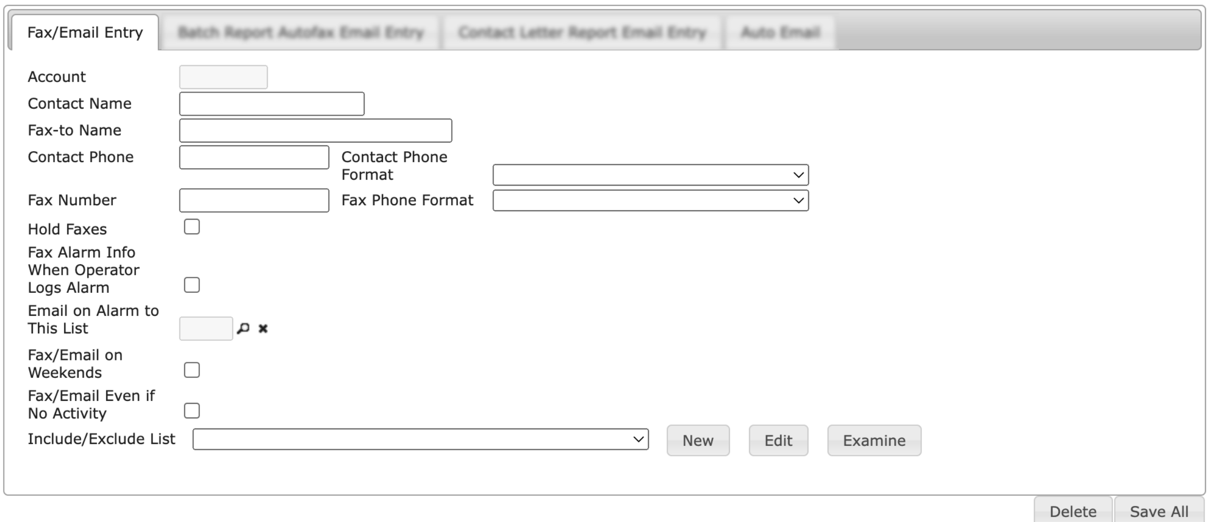
The **Fax/Email** tab allows users to configure how automated faxes and emails are sent from Matrix (Figure 1). Users can assign contact information to faxes and emails via the available tabs. Each tab is used to configure specific reports or alarm information sent via fax/email. These tabs are defined below.



(Figure 1)

Fax/Email Entry

The **Fax/Email Entry** tab is where users define the primary contact information for faxes and emails (Figure 2). This section will instruct users on defining this informaiton to ensure faxes and emails are routed correctly.

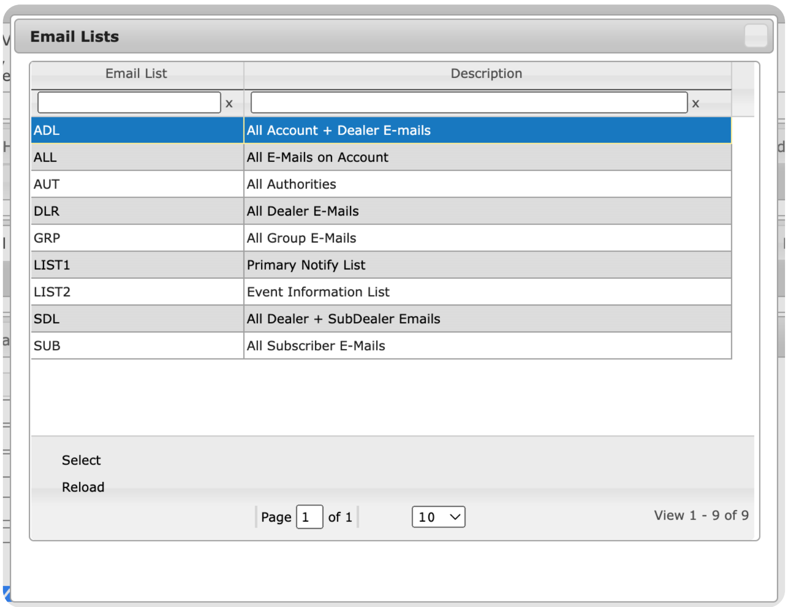


(Figure 2)

Perform the following steps to define contact information.

1. Input the first and last name of the contact into the **Contact Name** field.
2. If applicable, input the name any faxes should be made out to into the **Fax-To Name** field.
3. Input the contact's primary 10-digit phone number into the **Contact Phone** field.
4. Select the phone number masking that should be applied to the Contact Phone from the **Contact Phone Format** dropdown.

5. Input the 10-digit number faxes will be sent to into the **Fax Number** field.
6. Select the fax number masking that should be applied to the Fax Number from the **Fax Phone Format** dropdown.
7. If applicable, select the **Hold Faxes** option.
    - If selected, system generated faxes will be sent to a hold queue for operators to send the fax manually. Faxes will remain within the queue until sent. A hold time (set by administrators) is set on the queue; once elapsed, the system will generate an alarm for operators to handle so they are notified of waiting faxes.
8. If applicable, select the **Fax Alarm Info When Operator Logs Alarm** option.
    - If selected, the contact will receive faxes on all alarms that are operator handled.
9. Select the magnifying glass next to the **Email on Alarm to This List** field to display the **Email Lists** dialog box (Figure 3).

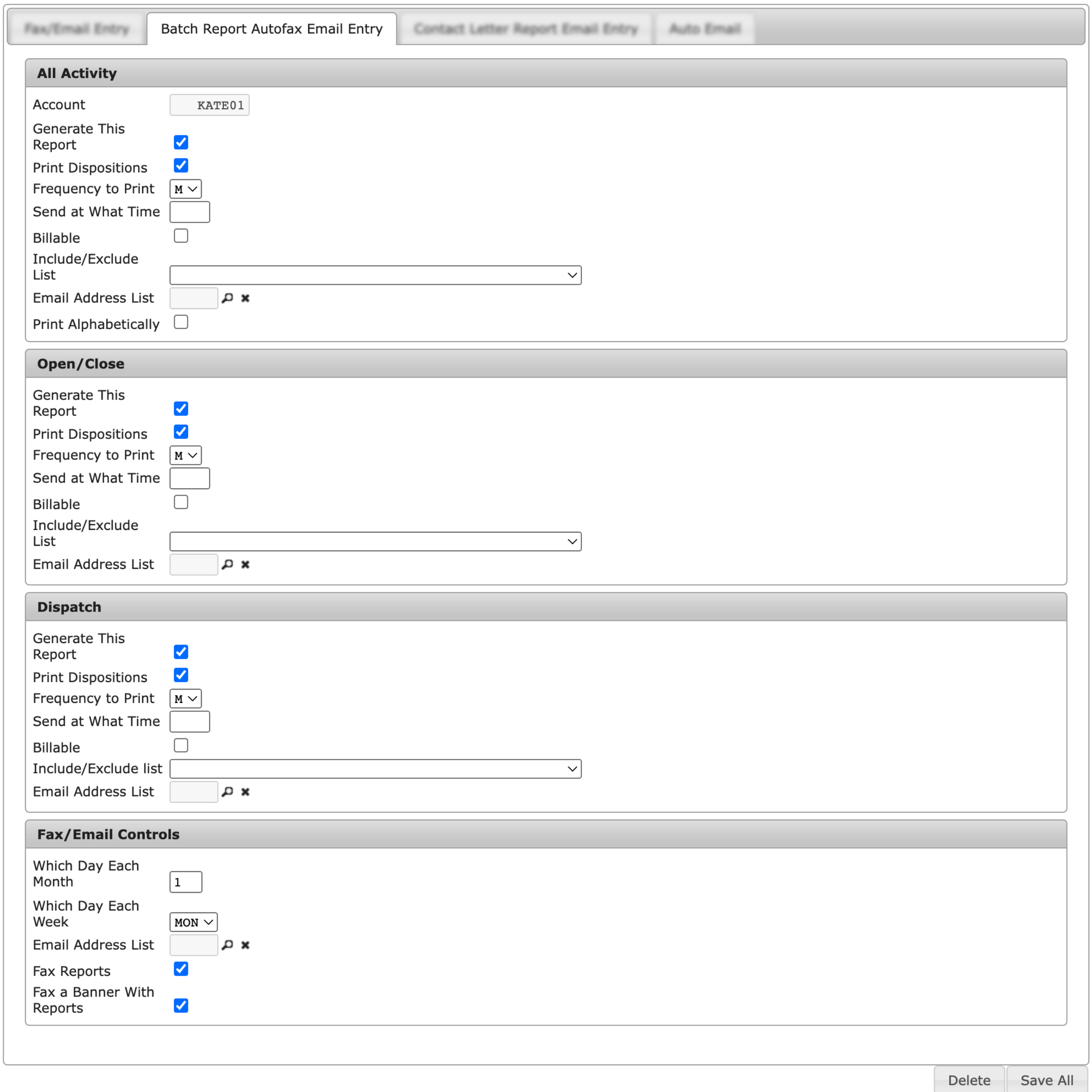


(Figure 3)

    - Select the desired email list any alarm notifications should send to from those available. These lists are managed under the **Notify Lists** tab. For more information on creating email lists, see the documentation available here.
10. If applicable, select the **Fax/Email on Weekends** option.
    - If selected, faxes and emails will send on weekending days. If deselected, faxes and emails will only send on business days (Monday - Friday).
    - **Please Note**: If reports are configured to *not* send on weekends and the next day the report is scheduled to send falls on a weekending day, the report will advance to send on the next business day.
11. If applicable, select the **Fax/Email Even if No Activity** option.
    - If selected, the system will send faxes or emails to the contacts even if no activity was triggered on the system.
12. If applicable, select an **Include/Exclude List** from the available dropdown.
    - If selected, the faxes and emails will be restricted to *include* or *exclude* information as configured. For more information on creating Include/Exclude lists, see the documenation available here.
13. Select **Save All** to complete assigining the contact information to the account.

Batch Report Autofax Email Entry

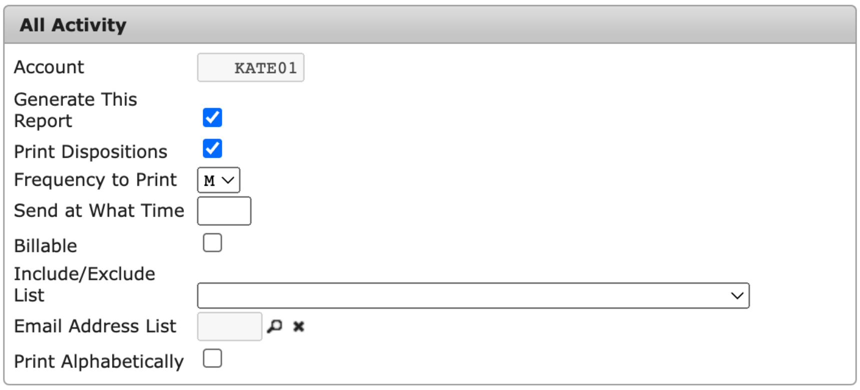
The **Batch Report Autofax Email Entry** tab is where users define how batch reports are handled by the system when sending autmated faxes and emails (Figure 4). Each report type and its available options is defined below.



(Figure 4)

All Activity

The All Activity report provides a record of *all* alarm processing activity on the account (Figure 5). Users can determine how the automated all activity report is handled by the system via the available options.



(Figure 5)

Perform the following steps to setup the All Activity report.

1. Select the **Generate This Report** option to confirm the system will produce the report.
    - If this option is *not* selected, the system will not produce the report and you can skip the

remaining steps.
2. If applicable, select the **Print Dispositions** option.
    - If selected, all processing information (the steps taken by operators while handling alarms) will be included in the report.
3. Select how often the report should print from the **Frequency to Print** dropdown.
    - **D**: Daily. This report will be sent every day at the set time.
    - **W**: Weekly. This report will be sent once a week at the set time.
    - **M**: Monthly. This report will be sent once a month at the set time.
    - **B**: Semi Monthly. This report will be sent *twice* a month. The report will first send on the initial day and time and then again 14 days after. The report will then recalculate for the beginning time of the *next* month before sending out again. **Please Note**: this report *does not* send every 14 days.
4. Input the time (in 24-hour format) the system should send the report into the **Send at What Time** field.
5. If applicable, select the **Billable** option.
    - If selected, the report will be labeled as a chargeable service and require payment from the subscriber to run.
6. If applicable, select an **Include/Exclude List** to assign to the report.
    - This will ensure certain defined information is either *included* on or *excluded* from the report. For more information on include/exclude lists, see the documentation available here.
7. If applicable, select the magnifying glass icon next to the **Email Address List** to search for and select an email list.
    - This list defines the individuals who will receive the report via email. For more information on creating email lists, see the documentation available here.
8. If applicable, select the **Print Alphabetically** option.
    - If this option is *not* selected, the report will print in chronological order.

You can select **Save All** to complete saving the All Activity report parameters.

Open/Close

The Open/Close report provides a record of processing activity for *open* and *close* signals *only* (Figure 6). Users can determine how the automated open/close report is handled by the system via the available options.

(Figure 6)

Perform the following steps to setup the open/close report.

1. Select the **Generate This Report** option to confirm the system will produce the report.
    - If this option is *not* selected, the system will not produce the report and you can skip the remaining steps.
2. If applicable, select the **Print Dispositions** option.
    - If selected, all processing information (the steps taken by operators while handling alarms) will be included in the report.
3. Select how often the report should print from the **Frequency to Print** dropdown.
    - **D**: Daily. This report will be sent every day at the set time.
    - **W**: Weekly. This report will be sent once a week at the set time.
    - **M**: Monthly. This report will be sent once a month at the set time.
    - **B**: Semi Monthly. This report will be sent *twice* a month. The report will first send on the initial day and time and then again 14 days after. The report will then recalculate for the beginning time of the *next* month before sending out again. **Please Note**: this report *does not* send every 14 days.

4. Input the time (in 24-hour format) the system should send the report into the **Send at What Time** field.
5. If applicable, select the **Billable** option.
    - If selected, the report will be labeled as a chargeable service and require payment from the subscriber to run.
6. If applicable, select an **Include/Exclude List** to assign to the report.
    - This will ensure certain defined information is either *included* on or *excluded* from the report. For more information on include/exclude lists, see the documentation available here.
7. If applicable, select the magnifying glass icon next to the **Email Address List** to search for and select an email list.
    - This list defines the individuals who will receive the report via email. For more information on creating email lists, see the documentation available here.

You can select **Save All** to complete saving the Open/Close report parameters.

Dispatch

The Dispatch report provides a record of all processing activity on signals where the operator had authorities dispatched (Figure 7). Users can determine how the automated Dispatch report is handled by the system via the available options.

(Figure 7)

Perform the following steps to setup the Dispatch report.

1. Select the **Generate This Report** option to confirm the system will produce the report.
    - If this option is *not* selected, the system will not produce the report and you can skip the remaining steps.
2. If applicable, select the **Print Dispositions** option.
    - If selected, all processing information (the steps taken by operators while handling alarms) will be included in the report.
3. Select how often the report should print from the **Frequency to Print** dropdown.
    - **D**: Daily. This report will be sent every day at the set time.
    - **W**: Weekly. This report will be sent once a week at the set time.
    - **M**: Monthly. This report will be sent once a month at the set time.
    - **B**: Semi Monthly. This report will be sent *twice* a month. The report will first send on the initial day and time and then again 14 days after. The report will then recalculate for the beginning time of the *next* month before sending out again. **Please Note**: this report *does not* send every 14 days.
4. Input the time (in 24-hour format) the system should send the report into the **Send at What Time** field.
5. If applicable, select the **Billable** option.
    - If selected, the report will be labeled as a chargeable service and require payment from the subscriber to run.
6. If applicable, select an **Include/Exclude List** to assign to the report.
    - This will ensure certain defined information is either *included* on or *excluded* from the report. For more information on include/exclude lists, see the documentation available here.
7. If applicable, select the magnifying glass icon next to the **Email Address List** to search for and select an email list.
    - This list defines the individuals who will receive the report via email. For more information on creating email lists, see the documentation available here.

You can select **Save All** to complete saving the Dispatch report parameters.

Fax/Email Controls

The **Fax/Email Controls** section is where users define basic sending protocols for the above reports (Figure 8). Users can determine when and how the reports are sent via the available options. These options are defined below.

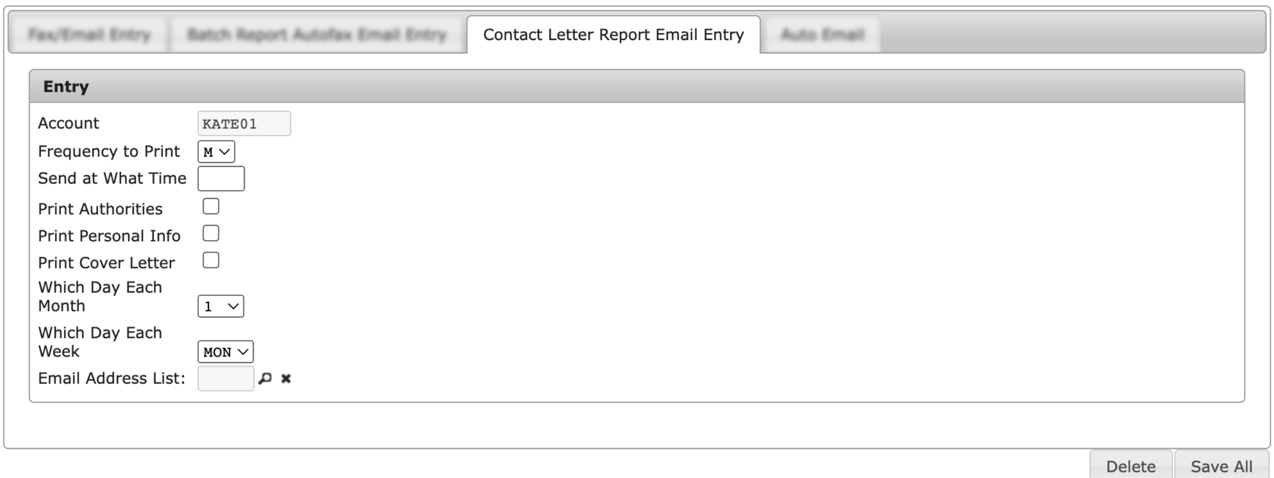
(Figure 8)

Option	Function
Which Day Each Month	Determines the day of the month reports will be sent out. This is only applicable for those reports configured to send **Monthly** or **Semi Monthly**.
Which Day Each Week	Determines the day of the week reports will be sent out. This is only applicable for those reports configured to send **Weekly**.
Email Address List	Determines the default list of individuals who will receive the report via email. For more information on creating email lists, see the documentation available here.
Fax Reports	If selected, the reports will be sent via fax to the number defined within the Fax/Email Entry tab.
Fax a Banner with Reports	If selected, faxed reports will include a cover page.

Once all fax/email settings are configured, select **Save All** to preserve your settings.

Contact Letter Report Email Entry

The **Contact Letter Report Email Entry** tab is where users define sending parameters of the Contact Letter report (Figure 9). This report contains a record of contacts on the account. Users can use this report to confirm the contacts and their information are still correct.



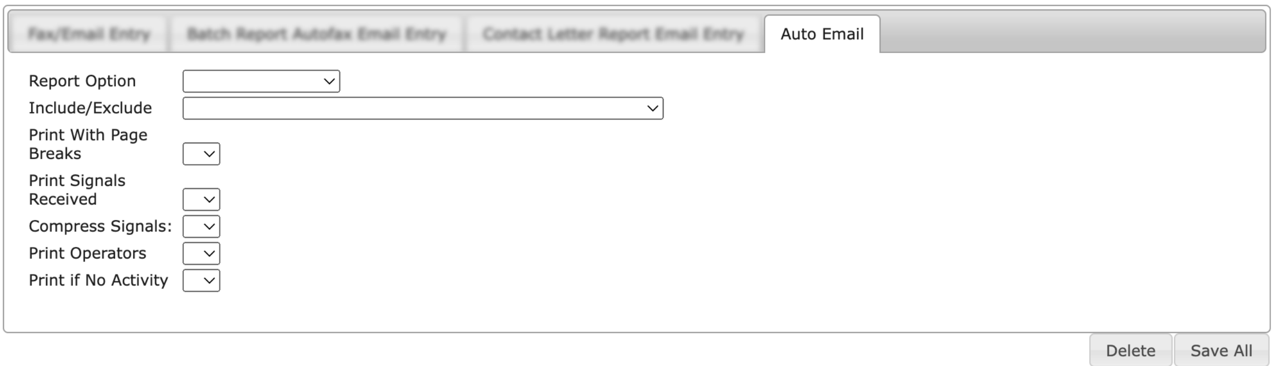
(Figure 9)

Perform the following steps to configure the Contact Letter report.

1. Select how often the report should print from the **Frequency to Print** dropdown.
    - **D**: Daily. This report will be sent every day at the set time.
    - **W**: Weekly. This report will be sent once a week at the set time.
    - **M**: Monthly. This report will be sent once a month at the set time.
    - **B**: Semi Monthly. This report will be sent *twice* a month. The report will first send on the initial day and time and then again 14 days after. The report will then recalculate for the beginning time of the *next* month before sending out again. **Please Note**: this report *does not* send every 14 days.
    - **Q**: Quarterly. This report will be sent once every three months at the set time.
2. Input the time (in 24-hour format) the system should send the report into the **Send at What Time** field.
3. If applicable, select the **Print Authorities** option.
    - If selected, authority contacts on the account will be included on the report.
4. If applicable, select the **Print Personal Info** option.
    - If selected, any information included within the Personal Information field on the contact will be included on the report.
5. If applicable, select the **Print Cover Letter** option.
    - If selected, a cover page will be included on the report.
6. If **M** or **B** are selected above, select the day of the month the report should send out on from the **Which Day Each Month** dropdown.
7. If **W** is selected above, select the day of the week the report should send out on from the **Which Day Each Week** dropdown.
8. Select the magnifying glass next to the **Email Address List** field to search for and select an email list.
    - This is the list of users who will receive the report via email on the set days.

Auto Email

The **Auto Email** tab is where users configure basic report formatting of the primary reports (Figure 10).



(Figure 10)

Perform the following steps to configure a report's format.

1. Select the report you wish to configure from the **Report Option** dropdown.
    - **All Activity**: The All Activity report provides a record of all alarm processing activity on the account.
    - **Email Dispatch**: The Dispatch report provides a record of all processing activity on signals where the operator had authorities dispatched.
    - **Open/Close**: The Open/Close report provides a record of processing activity for *open* and *close* signals *only*.
2. If applicable, select an **Include/Exclude** List to assign to the report.
3. Select if the report should include page breaks between sections from the **Print With Page Breaks** dropdown.
    - **Y**: Yes, the report will include page breaks between sections.
    - **N**: No, the report will continuously print information without breaks.
4. Select if the signal type should be included on the report from the **Print Signals Received** dropdown.

    - **Y**: Yes, signal types will be included.
      Signal Example:

      ```
      14:18:55 SIGNAL RECEIVED:  (BA   )                    SYS
                BURGLARY ALARM
      ```

    - **N**: No, signal types will *not* be included.
      Signal Example:

      ```
      14:18:55 BURGLARY ALARM                               SYS
      ```

5. The **Compress Signals** option is no longer in use. Users can skip this option.
6. Select if the system should include the operator code of the individual who handled the signal from the **Print Operators** dropdown.
    - **Y**: Include operator information on applicable signals.
    - **N**: Do *not* include operator inormation on applicable signals.
7. Select if the report should still send even if no signals were received in the timeframe from the **Print if No Activity** dropdown.
    - **Y**: The report will still send even if the account generated no activity.
    - **N**: If the account generated no actvity, the report will *not* send.
8. Select **Save All** to complete configuring the report settings.
9. Repeat steps 1-8 for any other reports within the **Report Option** dropdown as necessary.