Document Imaging – Tips and Tricks # 8

Forwarding Email Notifications to Committee Members

The Document Imaging team has enhanced the system’s email notification functionality such that a single, consolidated email notification per Plan/Subplan will be generated whenever one of the following activities occurs.

- New Application is added to the Applied and Processing queue.
- An Application is completed and therefore moved from Applied and Processing queue to the Ready for Review queue.
- A new supporting document is added to an Application in the Applied and Processing queue.
- A new Supporting Document is added to an Application in the Ready for Review queue.

Email notifications will list the previous day’s activity relating to the particular queue and will categorize the information by the four categories above.

Note: Only those categories for which there has been activity will be listed in the email notification.
Email headers have also been changed such that the Subject line will now reflect the Plan/Subplan being reported on and an indicator as to the type of activity contained in the notification. This will allow individual recipients to create Email Handling Rules specific to the email content.

**E.g.** Should a Coordinator wish to have these email notifications copied to the Committee Members so that they too can proactively review application materials, he could create an Email handling rule that will automatically copy these notifications to certain recipients.

**Note:** Should Coordinators have Different Committee Members for different Plans, separate rules can be created based on the Subject line of the header.

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**Email Header Example:**

| From: Document.Imaging@umassp.edu [mailto:Document.Imaging@umassp.edu] |
| Sent: Friday, August 19, 2011 11:07 AM |
| To: Jonathan Doe |
| Subject: Physical Therapy DPT [RR][AP] [UR] [UA] |

**Note:**

- **Physical Therapy DPT** Indicates all activity contained in this email notification pertains to the *Physical Therapy DPT* program.
- **[RR]:** Indicates that there has been activity relating to the *Ready for Review* queue for the specified program.
- **[AP]:** Indicates that there has been activity relating to the *Applied and Processing* queue for the specified program.
- **[UR]:** Indicates that an additional document has been added to one of the applications in the *Ready for Review* queue for the specified program.
- **[UA]:** Indicates that an additional document has been added to one of the applications in the *Applied and Processing* queue for the specified program.
Creating Outlook Email Rule

The Email rule described below will forward all email notifications received from the Document Imaging System to the Committee Members you specify.

Step 1: Access your Outlook Email

Step 2: Open the Rules and Alerts module by selecting Tools/Rules and Alerts

Step 3: Select the E-mail Rules Tab and click the New Rules icon.
Step 4: Highlight the “Check messages when they arrive” option and then click the Next button.

Step 5: Check the “From people or distribution list” condition and then click the “People or distribution list” link that appears in the lower pane.
Step 6: Type “document.Imaging@umassp.edu” in the From -> field. Then click the OK button and then the Next button.

Step 7: Check the “Forward to people or distribution list” action.
……and then click the “People or distribution list” value that appears in the lower pane.

Step 8: Select the first recipient from the list of email addresses that appears and then click the “To” button. Repeat this step until all desired recipients are listed in the “To:” field.

……Then click the Ok button and then click the Next button twice.

Once the next Button is pressed a second time, the “Finish Rule Set Up” window should be displayed on the screen.
Step 8: Specify a name for this new rule. (E.g. DI Notification Forwarding Rule) and Check the “Turn on this rule: option.

Step 12: Click the Finish Button to complete the programming.

Step 13: Click the Apply button to enable the rule and then the OK button to complete the process.