

Targeted Email Updates in ZIM

Today, email has been fully incorporated into all aspects of our business and personal lives. We all receive so many emails that a balance must be struck in order to achieve effective business communications. If you don't send out any email you will be ignored, and if you send out too many, or if the email is not effectively targeted, the user will not open and read the email, and your message will also be ignored.

In ZIM there is a very real danger of inundating users with incident case status update email notifications. If everyone in an organization sends every user an email update, that can work in very small organizations, but will fail catastrophically in larger organizations.

At one end of the spectrum, some customers in large organizations prefer to send out no email at all. Here the user is obliged to periodically log on to the system to check the status of the cases. Fortunately ZIM has excellent support for generating reports that give the user a first class overview of the current state of the system, thus bringing a user up to speed after an "absence period" for users that log on to the system only once a week. In this scenario, no emails from ZIM works very well.

On the other end of the spectrum, most small and mid-sized organizations must send out targeted email status updates. In order to overcome the problem of "email fatigue," and to assure that selected users get important information about changes in the status of individual incident cases, we have developed the following email strategy.

ZIM Email Notification Strategy

No email is sent out, unless it is the result of an action by a human being for a specific incident case. A user can set up notifications for a specific case, by default there are no notifications so human initiative is required. Types of notification can be: change in status, when a case is closed, or when a time limit has expired. ZIM has three methods whereby a user can decide to send out emails to other users.

If you have been assigned as the case-worker to a case, but you didn't set yourself as the case-worker, then you will receive an email.

If someone adds you to the CC list for a specific case, you will receive an email.

If someone sends you a copy of the case with a comment, you will receive an email. In this situation, a printable version of the case can be sent by email to the currently logged on user. The user can then forward this email to anyone. It will then be very obvious to the recipient that this email originated from a human being and not from a computer. The reply will of course go back to that user who sent the email. The advantage of this method is that it will traverse enterprise spam filters, because the anti-spam systems will recognize that it is not machine generated.

The use of the CC list feature, ensures that selected individuals receive important status updates.

Email Features

The **Description** tab for each incident case includes an email CC control area where individuals can be added or removed from the CC list, and where status report emails can be generated. Click the **New Member** button to add a new recipient. Click the **Remove** button to remove a selected recipient from the CC list. All contacts in the CC list will automatically receive email when the case status changes. The **Send report by email to logged on user** button sends a report email to all users currently logged on.

Save Cancel

Description	Responsibility	Costs	Activities
Case Number TR-4267	Date Created 2/13/14 / 2/13/14	Created by Ariane Caixeta Pereira	Cc list - copied on status changes to case New Member Bjørn Bekkeheien Remove Send report by email to logged on user Printer Friendly Version:

The list can also be used with **Printer Friendly Version** for sending emails that include scheduled reports. The following controls are found after clicking the **Printable Version** icon.

Close Update Printer Friendly Version

Send report by email to logged on user Send as email to cc list

The function **Send as email to the cc list** will send the scheduled report to anyone who is added to the list. Also included is a text field in the layout of the report. Comments in the text field will be included with the email.

If you want to find the emails that have been sent out for a specific case, this can be done by searching the reference number in the **Email log**. Enter the number in **Text Search** and select **Update**.