



TECH SUPPORT ARTICLE **TSA 0026 Emails for new / revised documents**

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Application

This article is based on Qudos 3 versions 3.38 and above and refers to the use of Microsoft Outlook for Office 365. Other versions may differ.

Background

Qudos 3 has the facility to email an individual or group in certain events e.g. a document release or revision. That function relates to the configuration setting "The Email All group name (for Master Documents)". The setting will instruct Qudos 3 to email an individual or group in certain events e.g. a document release or revision. Many installations of Qudos 3 have a default setting of "All mail". Please note that this is a generic entry only and must be configured to an appropriate value via the menu item Edit / Management Console / The Email All group name (for Master Documents).

This article relates to using the Setting **Email address or group name (for changes in Master Document List)**. That setting applies to is for merging or auto-forwarding email about a document release or revision.

- If an email address is used, a rule may be set in your email software to auto-forward such emails.
- If a group is used, the group name should match a selected group in your email software - which must be on the same server as Qudos 3.

Method

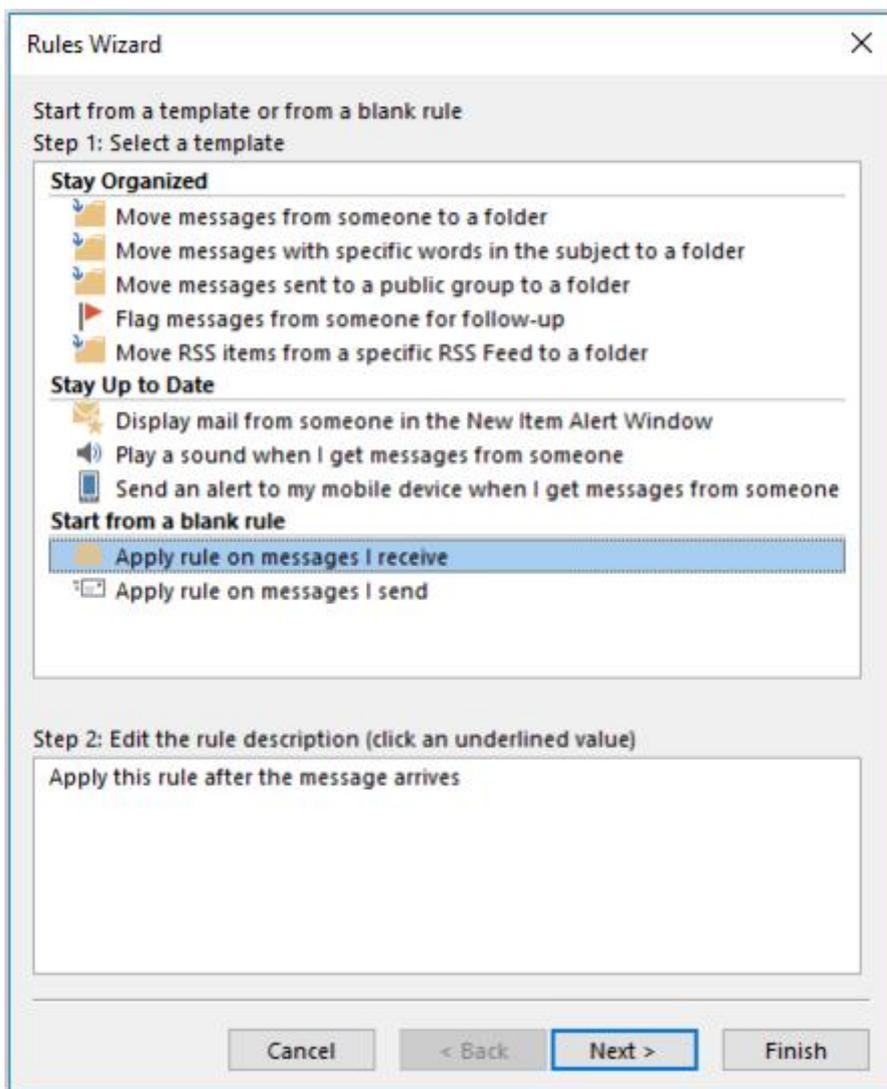
In a self-hosted installation with an Outlook mail server co-located with Qudos 3 it may be possible to simply refer to an existing Outlook mail group.

Where that is not the case e.g. in cloud-hosted or some self-hosted installations, the alternative is to set the value in menu item Edit / Management Console / The Email All group name (for Master Documents) to a single email address, and then to manually or automatically forward the email.

The remainder of this article discusses setting an auto-forward rule set for such emails. The exact method will depend on the email service and version that your organization uses. The following example is based on Microsoft Outlook 2016.

In Qudos 3 menu item Edit / Management Console / The Email All group name (for Master Documents) enter the chosen email address to receive the initial emails.

- Open that email account in Microsoft Outlook.
- From File menu, select Manage Rule and Alerts
- Click on New Rule
- In the Rules Wizard, Select Apply Rule on messages I receive, and click Next



There are 2 main components of an Outlook email message rule:

- a) Select conditions to check
- b) Edit the rule description (what to do with the message)

These are described below.

Step 1: Select conditions

Select '**from people or public group**' and '**with specific word in the subject**'.

Step 2: Edit the rule description.

Edit where prompted as follows: define who **from**, and with what **specific words** in the subject.

From

For Qudos cloud-hosted clients, the emails will be from noreply@qudos3.com.
For those with on-premise, self-hosted installations, you will need to check your sending mail account for Qudos 3 email notifications.

Specific words

Specific words for New document notifications will be 'New document'.
Specific words for document revision notifications will be 'Document Revisions'. You could

add these as separate rules or add both to the same rule.

Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

- from people or public group
- with specific words in the subject
- through the specified account
- sent only to me
- where my name is in the To box
- marked as importance
- marked as sensitivity
- flagged for action
- where my name is in the Cc box
- where my name is in the To or Cc box
- where my name is not in the To box
- sent to people or public group
- with specific words in the body
- with specific words in the subject or body
- with specific words in the message header
- with specific words in the recipient's address
- with specific words in the sender's address
- assigned to category category

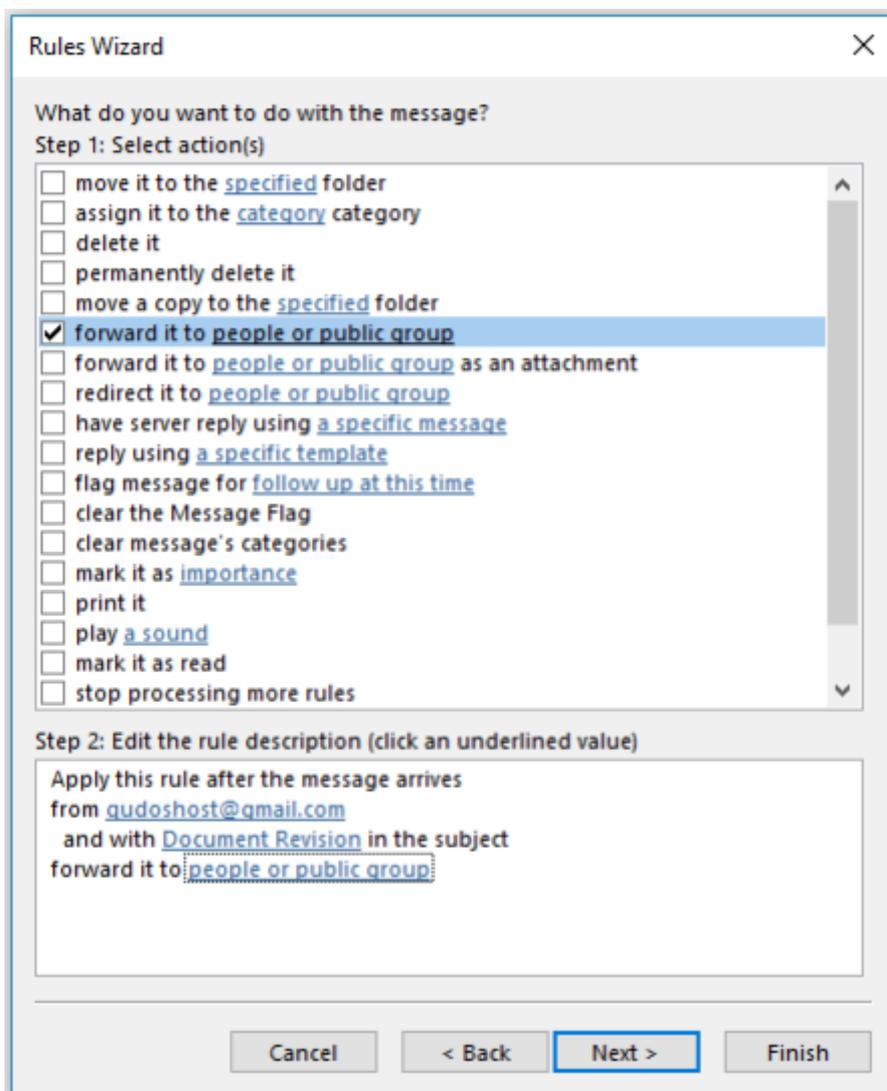
Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
from people or public group
and with specific words in the subject

Cancel < Back Next > Finish

What to do with the message

In Step 1, select **'forward it to people or public group'**.



In Step 2, click on the link to **'from people or public group'**. This will open your address book for you to define who to forward the message to.

You could also create more specific rules if required e.g. for specific wording in the subject or message content that might direct specific emails to people in particular roles, business, locations etc.

For further guidance on setting up Microsoft Outlook rules, contact Microsoft Tech Support or their online help resources.