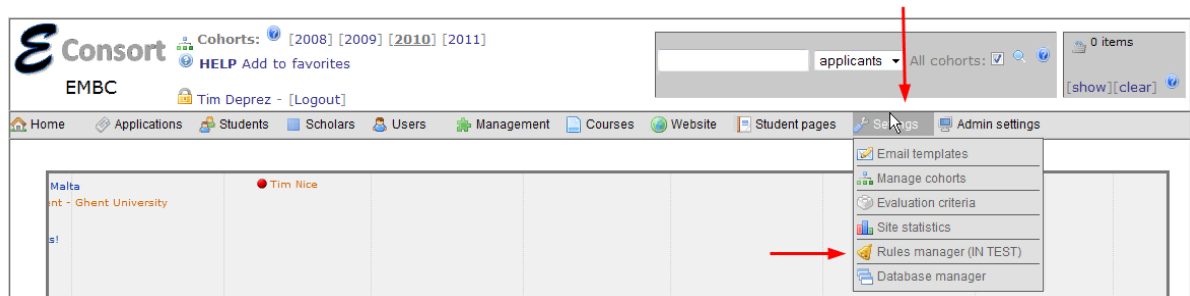


Using rules in Econsort

Log in into your EConsort instance, select “Settings”, “Rules manager”



Since initially there are no rules declared, you need to create a new rule

EConsort Rules manager

This feature will in the near future allow at

[create new rule](#) [view list of rules](#)

Rule name	Rule Periodicity	Last check
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This feature will in the near future allow automated email reports based on field changes in files of students.

[\[create new rule\]](#) [\[view list of rules\]](#)

Add a new Rule

Name of the rule

Dayly change Bank account

Periodicity

each_day

Field to be checked

Bank Account nr

Email Recipient

tim.deprez@ugent.be; embc@ugent.be

Email Subject

Daily update bank account

Email Message

Source

Format

Size

Dear user,

please find the list below:

Store affected persons in list

YES

Overwrite previous list

NO

add rule

First you add a rule name,

Then the periodicity of the rule (every day/week/month/...)

Indicate the field in the list which has to be checked.

Enter the email recipients (divided by a semicolon or “;”)

Enter the email subject and body

The last 2 options give you the possibility whether you want to store the affected persons in a list (in this case which students/applicants “datafield” (as declared above) has changed, and if this list needs to be stored, that would be in the existing list or in a new list.


Finally click “add rule”

The next screen will show you the list of all rules

EConsort Rules manager (in test)

This feature will in the near future allow automated email reports based on field changes in files of students.

[\[create new rule\]](#) [\[view list of rules\]](#)

Rule name	Rule Periodicity	Last check	
Daily change Bank account	each_day	17/11/2010	









In this case the “Daily change Bank account” rule, which is executed each day, and the last check was done on 17/11/2010 (= the first day of the rule =the day the rule was set up)

(By clicking on the pencil-icon, you go to the editing screen of this rule, as shown below)

EConsort Rules manager (in test)

This feature will in the near future allow automated email reports based on field changes in files of students.

[\[create new rule\]](#) [\[view list of rules\]](#)

Name of the rule:	 Daily change Bank account
Periodicity:	 each_day
Field to be checked:	 Bank Account nr
Email recipient:	 tim.deprez@ugent.be; embc@ugent.be
Email subject:	 Daily update bank account
Email message:	 Dear user,
please find the list below:	
Store in list:	 YES
Overwrite previous list:	 YES
[delete]	

Each parameter of the rule can be changed.

You can set up different rules on different fields, sent to different people.