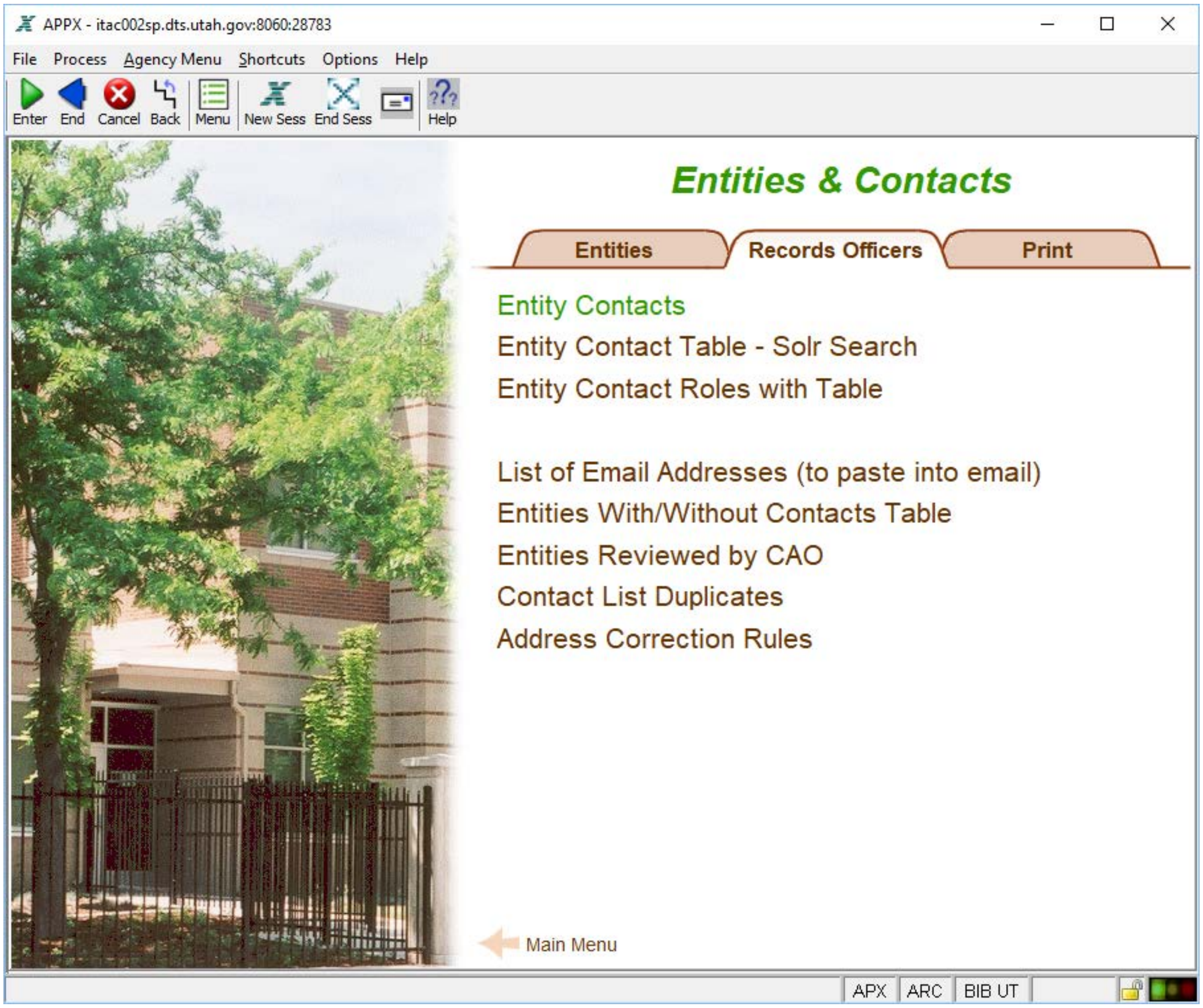
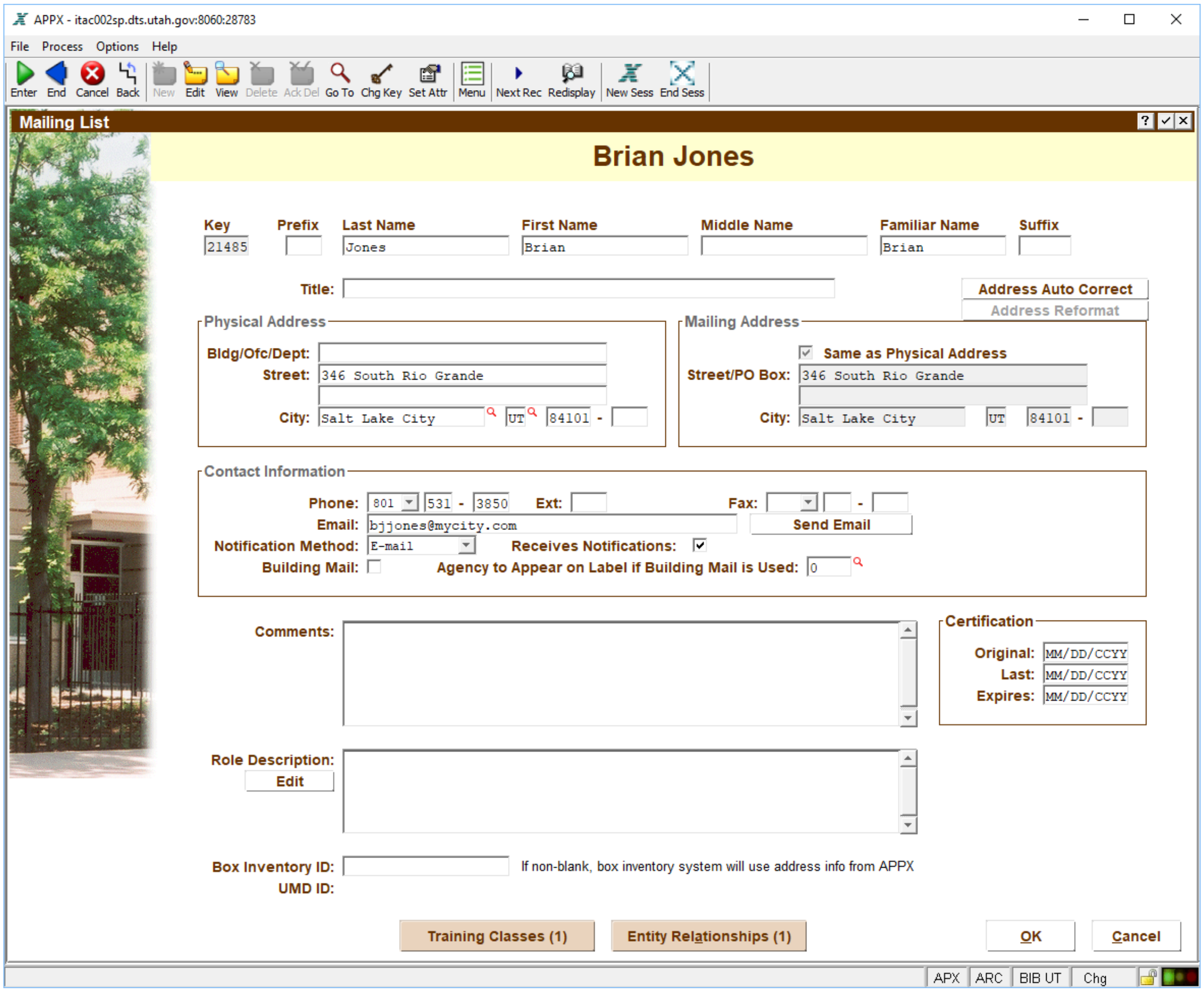
Entity Contacts

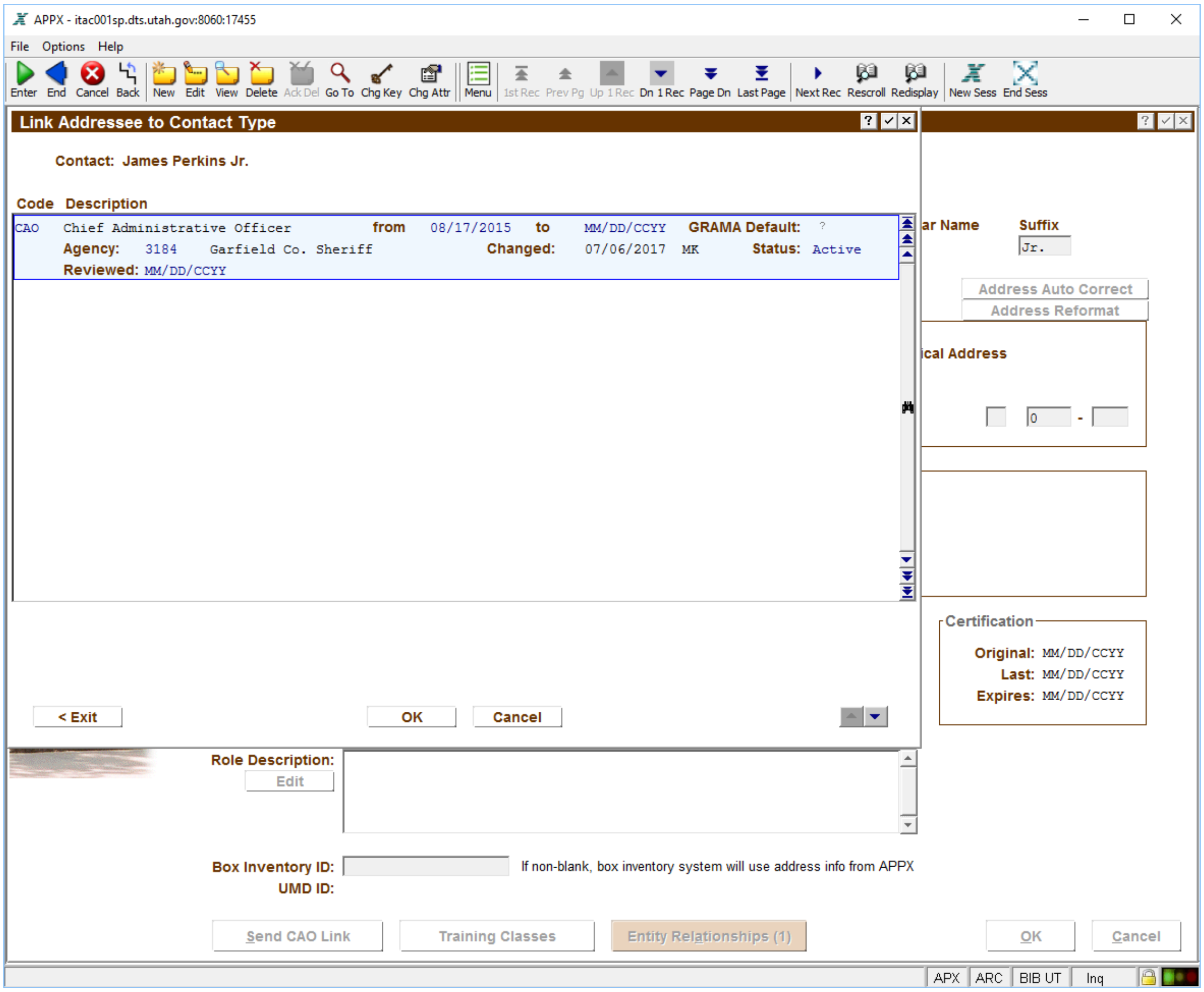
June 7, 2018

The way to edit records in our mailing list has changed. You may access the mailing list directly by clicking Entity Contacts on the Entities Menu, Records Officers tab, and bringing up a name as usual:





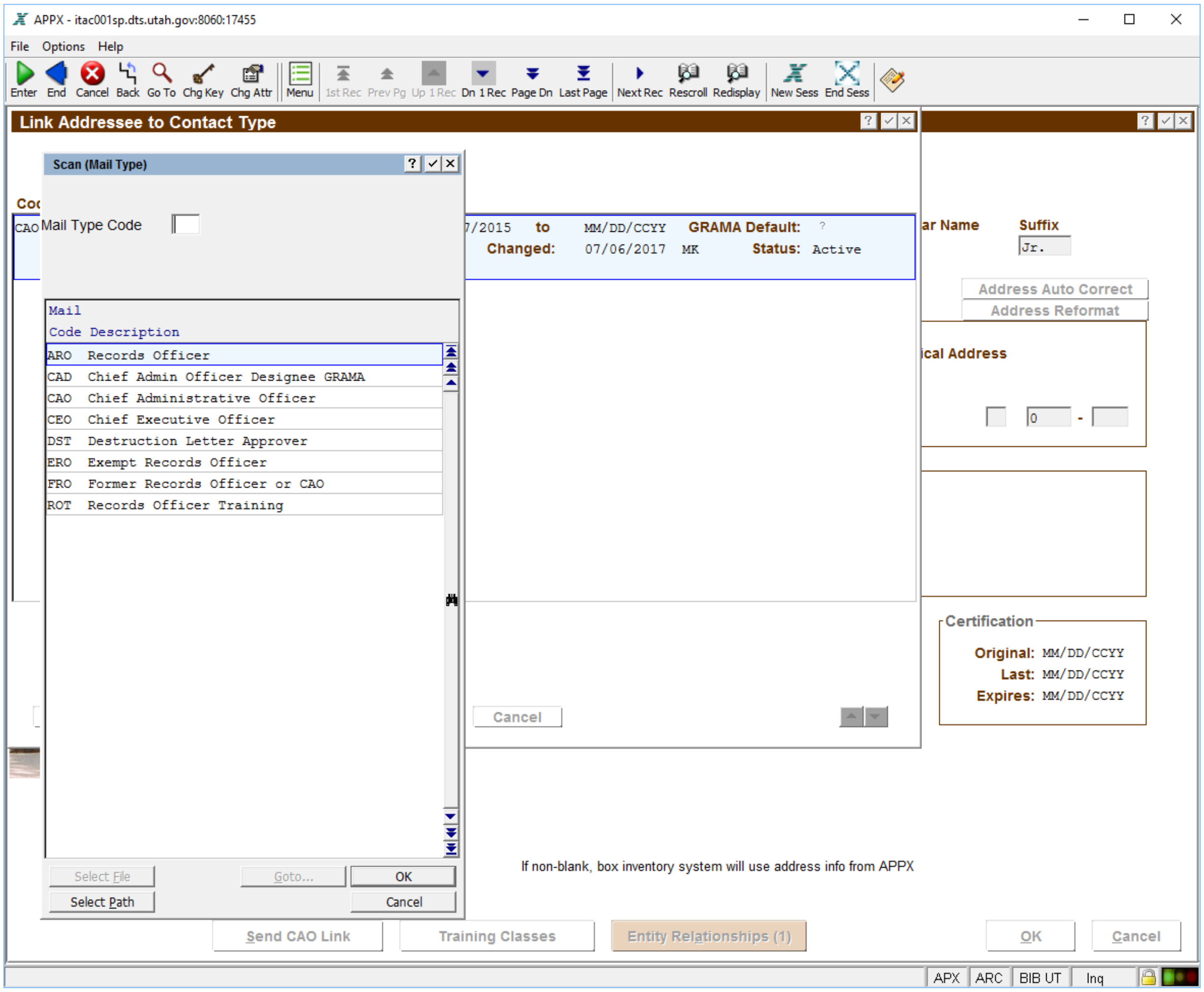
To navigate to the next record, click on the Next Rec button on the toolbar. To view the roles and entity relationships this person has, click Entity Relationships:



Provide the 3-letter code representing the role of the person, such as:

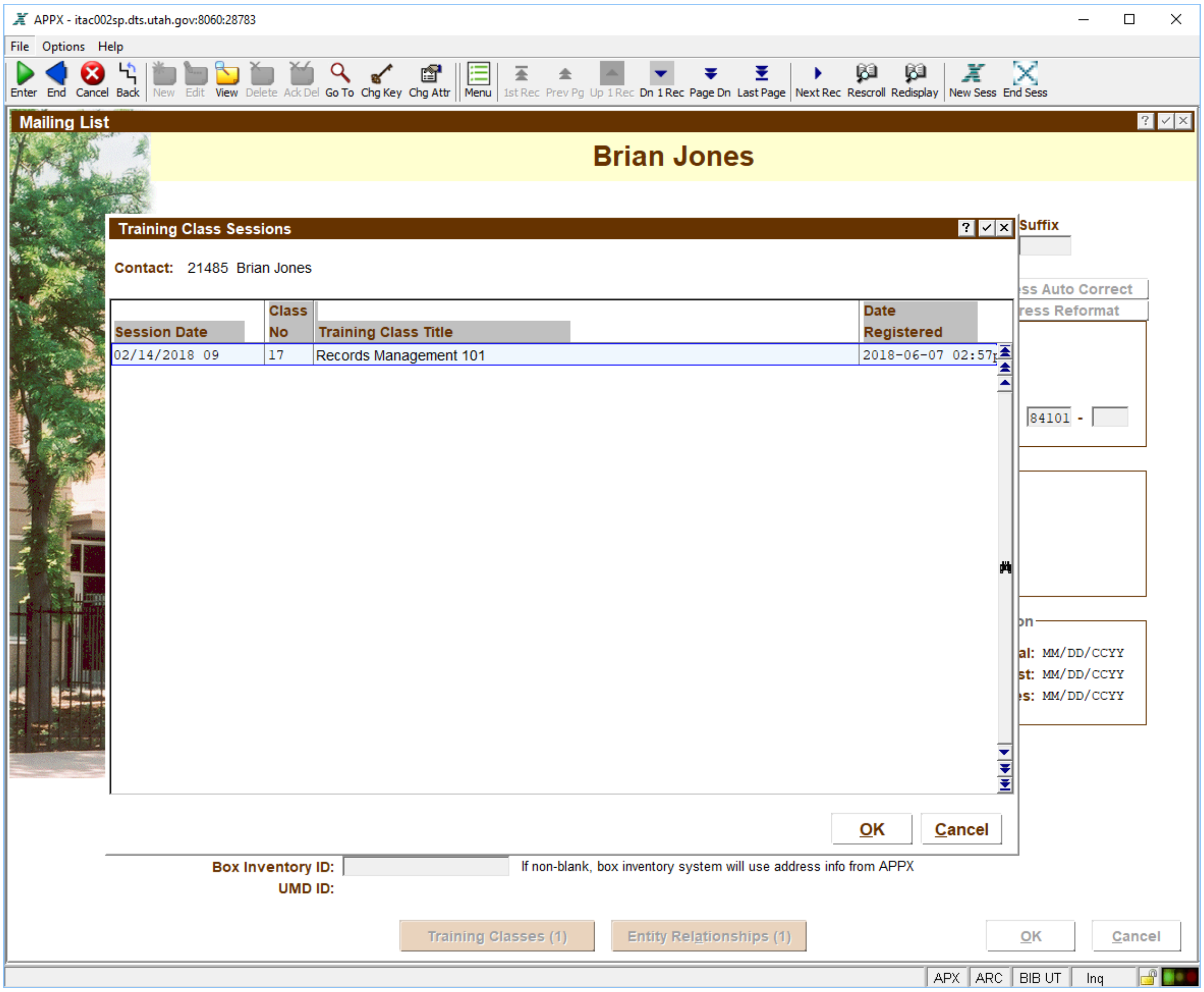
- ARO
- CAD
- CAO
- CEO
- DST
- ERO
- FRO
- ROT

Or click the Scan option (red magnifying glass) to lookup available values:



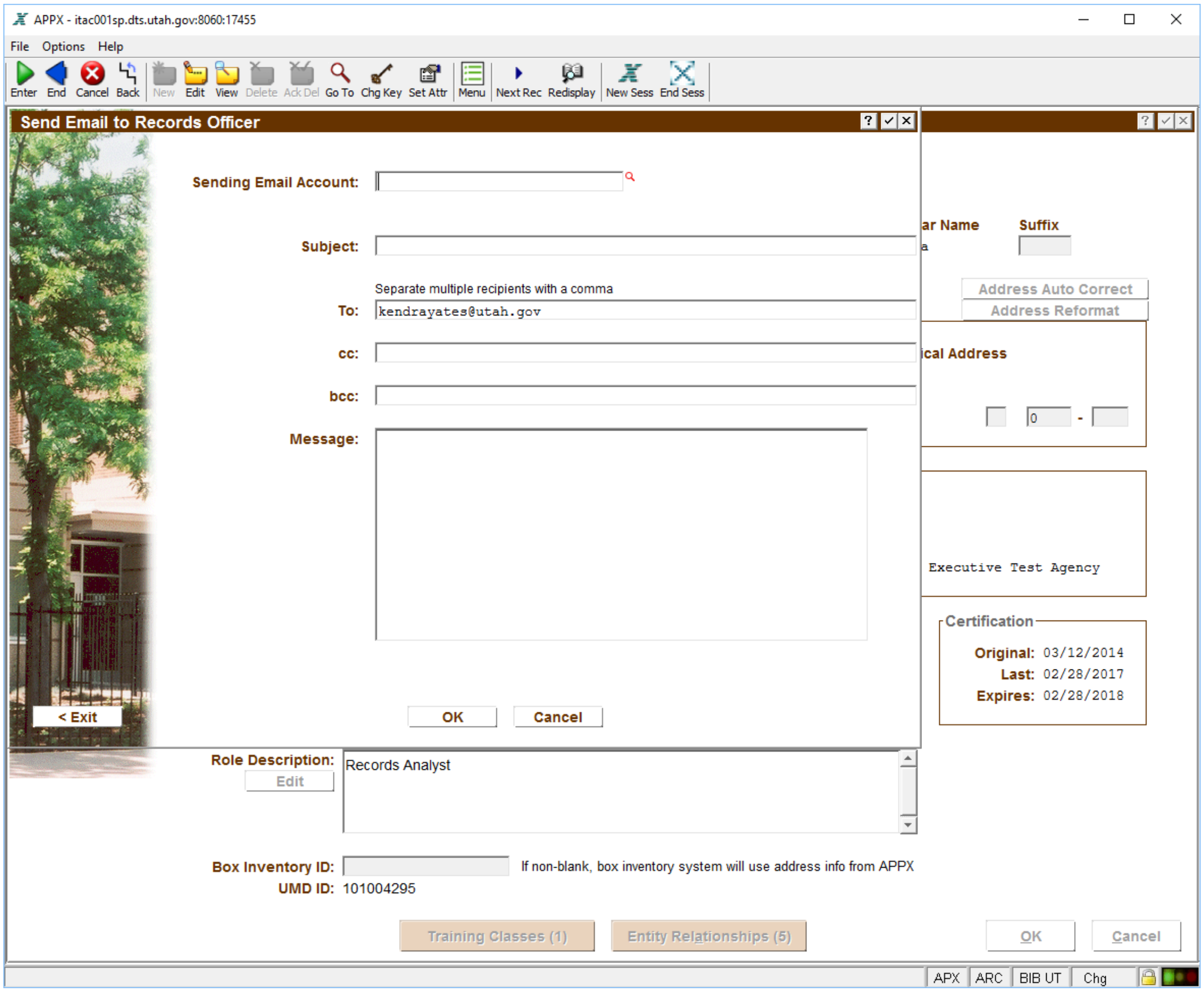
Click OK to bring back a value. If you are adding a new role, the start date will be filled in automatically. The GRAMA Default field is used to identify if the person has a primary responsibility of answering public records requests, in which case they will automatically receive messages from the Open Records Portal when new requests are submitted. The Agency field is for identifying the entity number, which is also a lookup value. The Status field impacts certain website functions, and should be set to Active if the person is still acting in that role. The Reviewed date identifies the last time the CAO reviewed his/her agencies for accuracy in setting records officer assignments. It is only set if the person is a CAO and that CAO submitted the CAO Review web form.

Click Cancel to return to the previous screen. Click Training Classes:



If this individual has registered for training classes, they will be listed here. Click Cancel to return to the previous screen.

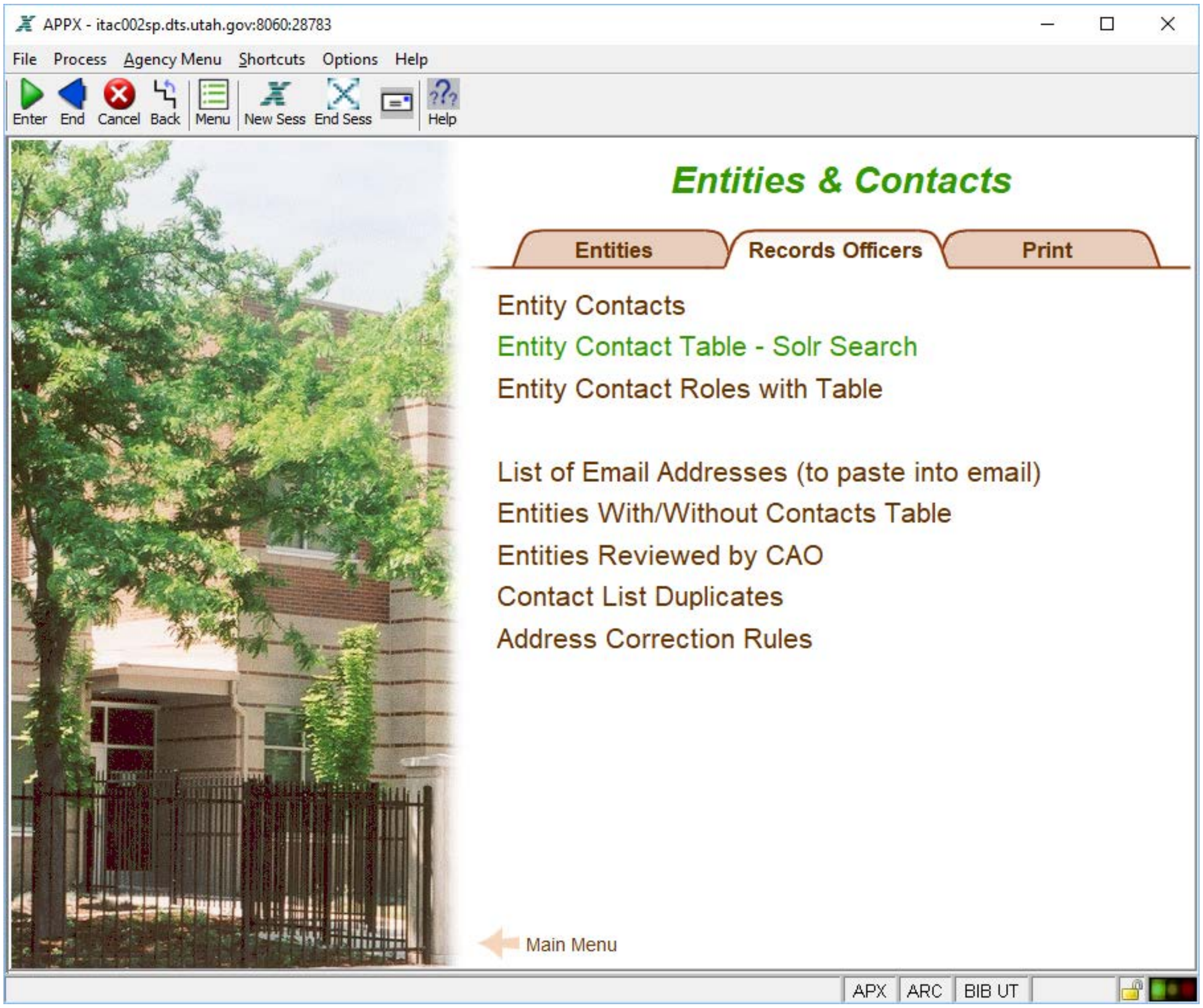
To email a records officer, click on the Send Email button.



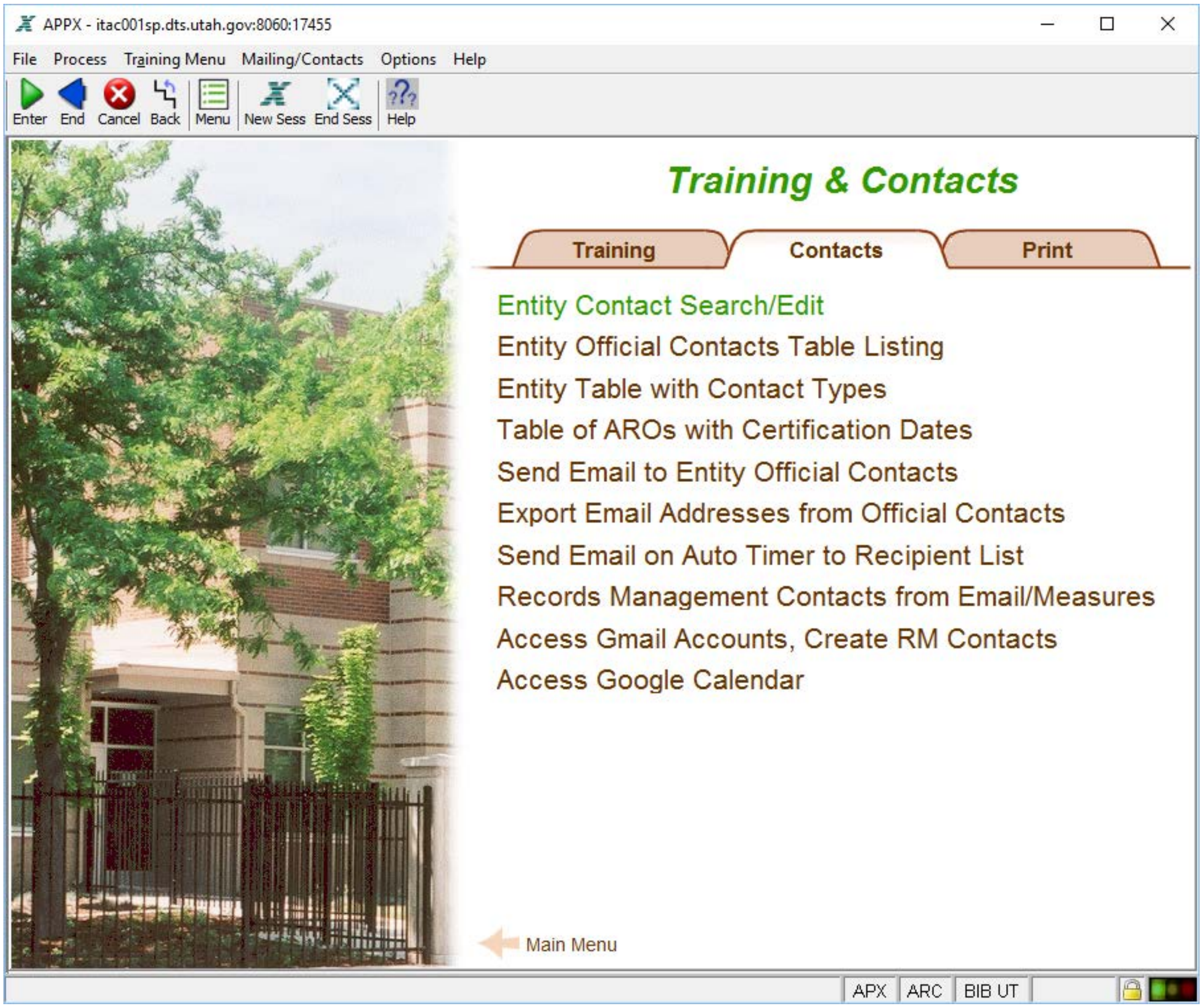
Choose from the list of sending email accounts that have been set up to work with the Gmail API. Compose your message and click OK to send.

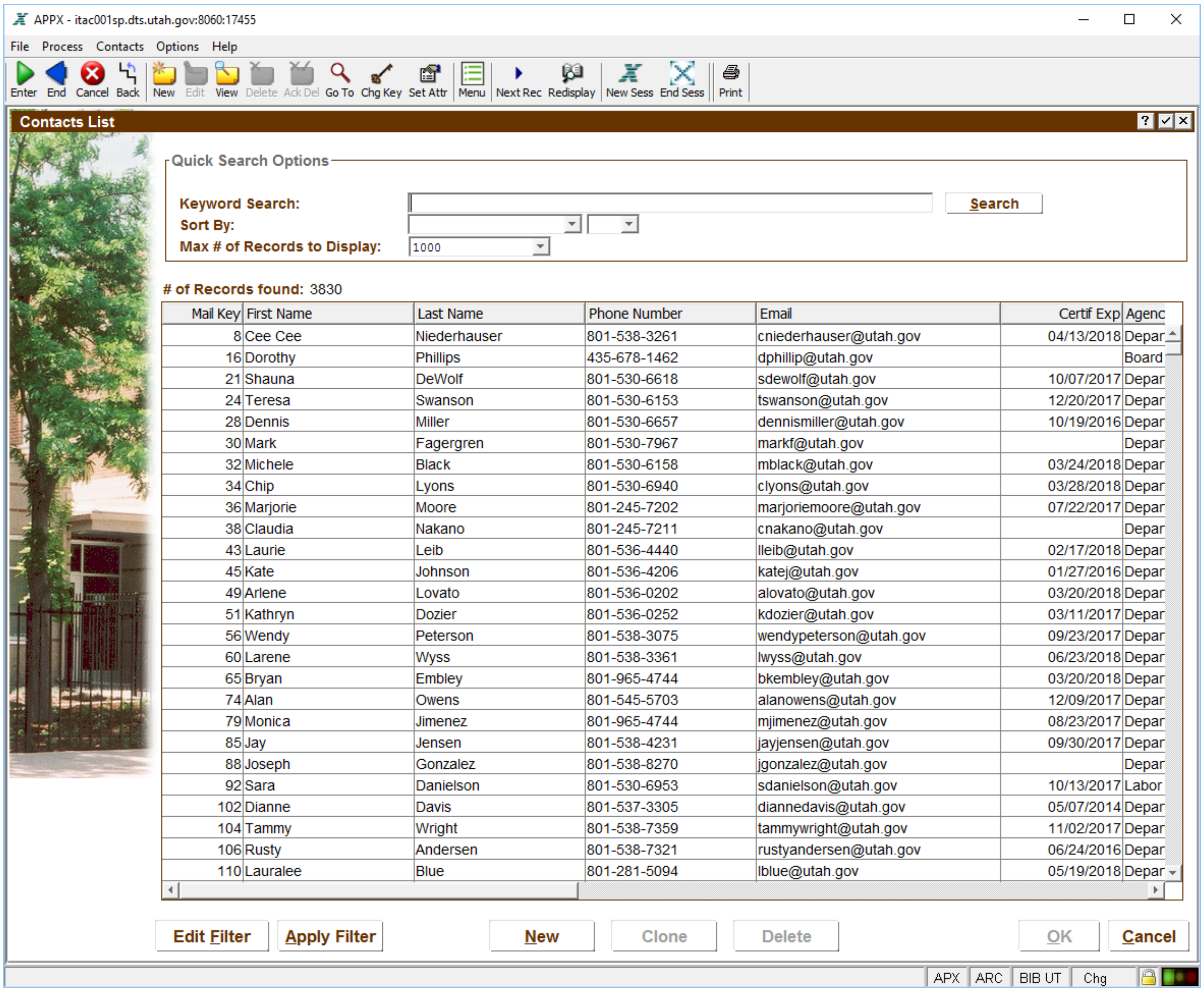
Click Cancel to return to the menu.

Click on the Entity Contact Table – Solr Search option on the menu:



Note that this same option is called Entity Contact Search/Edit on the Training Menu, Contacts tab:


APPX - itac001sp.dts.utah.gov:8060:17455
File Process Training Menu Mailing/Contacts Options Help
Enter End Cancel Back Menu New Sess End Sess Help
Training & Contacts
Training
Contacts
Print
Entity Contact Search/Edit
Entity Official Contacts Table Listing
Entity Table with Contact Types
Table of AROs with Certification Dates
Send Email to Entity Official Contacts
Export Email Addresses from Official Contacts
Send Email on Auto Timer to Recipient List
Records Management Contacts from Email/Measures
Access Gmail Accounts, Create RM Contacts
Access Google Calendar
Main Menu
APX ARC BIB UT



APPX - itac001sp.dts.utah.gov:8060:17455

File Process Contacts Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess Print

Contacts List

Quick Search Options

Keyword Search: Search

Sort By:

Max # of Records to Display: 1000

# of Records found: 3830

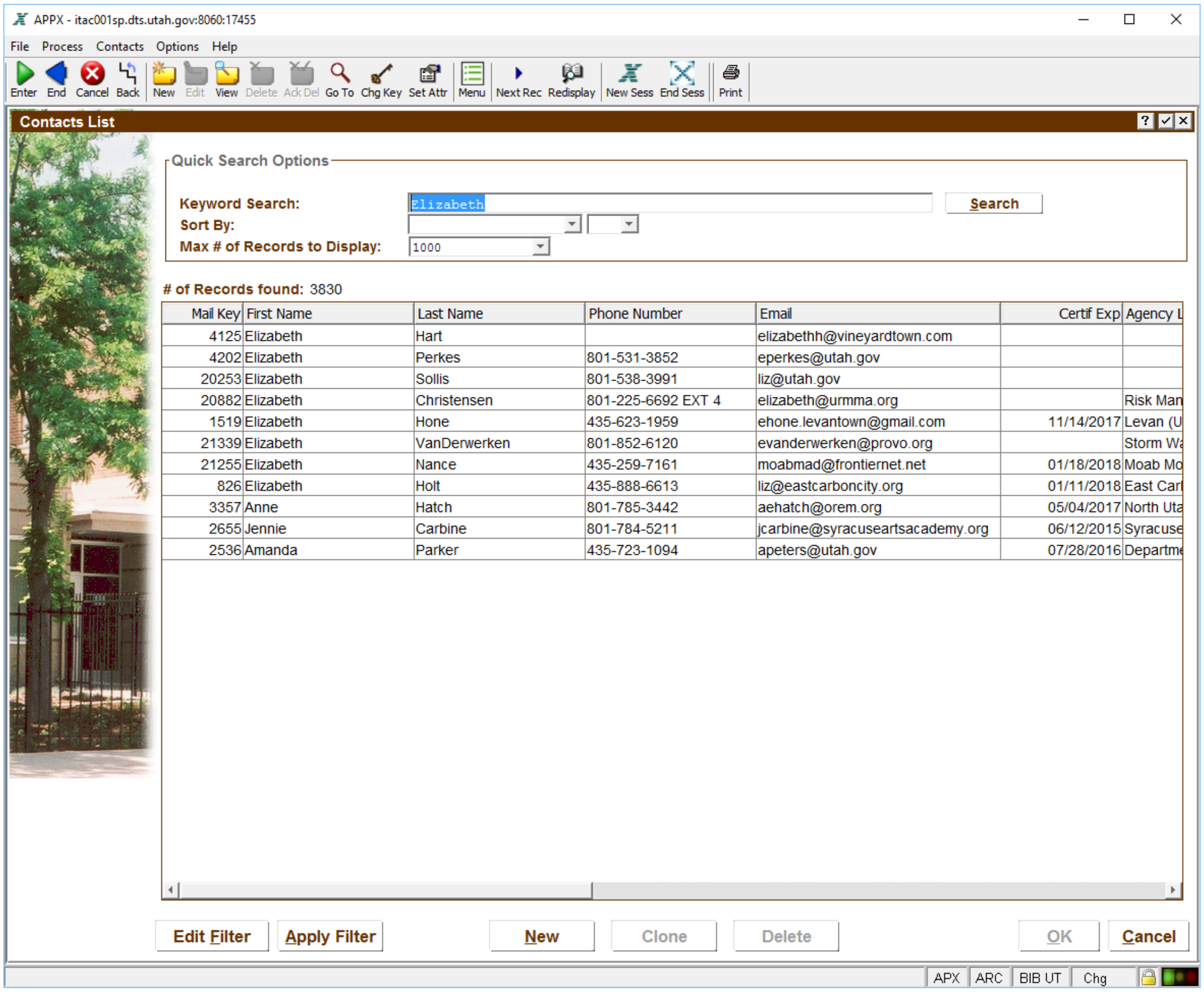
Mail Key	First Name	Last Name	Phone Number	Email	Certif Exp	Agenc
8	Cee Cee	Niederhauser	801-538-3261	cniederhauser@utah.gov	04/13/2018	Depar
16	Dorothy	Phillips	435-678-1462	dphillip@utah.gov		Board
21	Shauna	DeWolf	801-530-6618	sdewolf@utah.gov	10/07/2017	Depar
24	Teresa	Swanson	801-530-6153	tswanson@utah.gov	12/20/2017	Depar
28	Dennis	Miller	801-530-6657	dennismiller@utah.gov	10/19/2016	Depar
30	Mark	Fagergren	801-530-7967	markf@utah.gov		Depar
32	Michele	Black	801-530-6158	mblack@utah.gov	03/24/2018	Depar
34	Chip	Lyons	801-530-6940	clyons@utah.gov	03/28/2018	Depar
36	Marjorie	Moore	801-245-7202	marjoriemoore@utah.gov	07/22/2017	Depar
38	Claudia	Nakano	801-245-7211	cnakano@utah.gov		Depar
43	Laurie	Leib	801-536-4440	lleib@utah.gov	02/17/2018	Depar
45	Kate	Johnson	801-536-4206	katej@utah.gov	01/27/2016	Depar
49	Arlene	Lovato	801-536-0202	alovato@utah.gov	03/20/2018	Depar
51	Kathryn	Dozier	801-536-0252	kdozier@utah.gov	03/11/2017	Depar
56	Wendy	Peterson	801-538-3075	wendypeterson@utah.gov	09/23/2017	Depar
60	Larene	Wyss	801-538-3361	lwyss@utah.gov	06/23/2018	Depar
65	Bryan	Embley	801-965-4744	bkembley@utah.gov	03/20/2018	Depar
74	Alan	Owens	801-545-5703	alanowens@utah.gov	12/09/2017	Depar
79	Monica	Jimenez	801-965-4744	mjimenez@utah.gov	08/23/2017	Depar
85	Jay	Jensen	801-538-4231	jayjensen@utah.gov	09/30/2017	Depar
88	Joseph	Gonzalez	801-538-8270	jgonzalez@utah.gov		Depar
92	Sara	Danielson	801-530-6953	sdanielson@utah.gov	10/13/2017	Labor
102	Dianne	Davis	801-537-3305	diannedavis@utah.gov	05/07/2014	Depar
104	Tammy	Wright	801-538-7359	tammywright@utah.gov	11/02/2017	Depar
106	Rusty	Andersen	801-538-7321	rustyandersen@utah.gov	06/24/2016	Depar
110	Lauralee	Blue	801-281-5094	lblue@utah.gov	05/19/2018	Depar

Edit Filter Apply Filter New Clone Delete OK Cancel

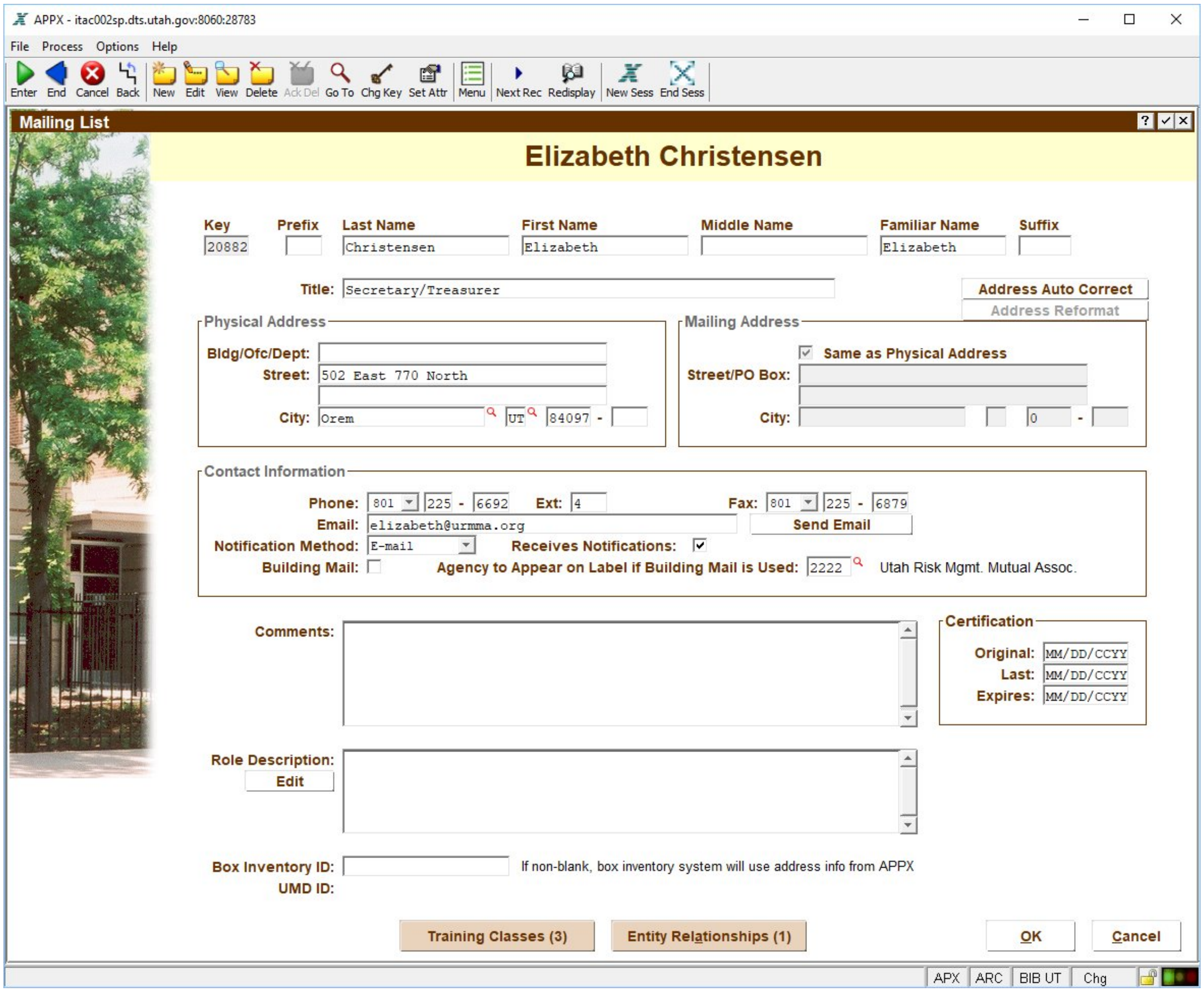
APX ARC BIB UT Chg

There are several important things to note about this screen. The first one is the “Max # of Records to Display” field at the top, where it limits the search results to a certain number of hits. You may edit the filter to change this setting. In the screen above, it is set to 1,000, which is fewer than the number of names in the database, so if you start sorting the table by columns, realize that you don’t have the whole set of names in front of you.

You may do a simple keyword search at the top. Add a search term and click Search.

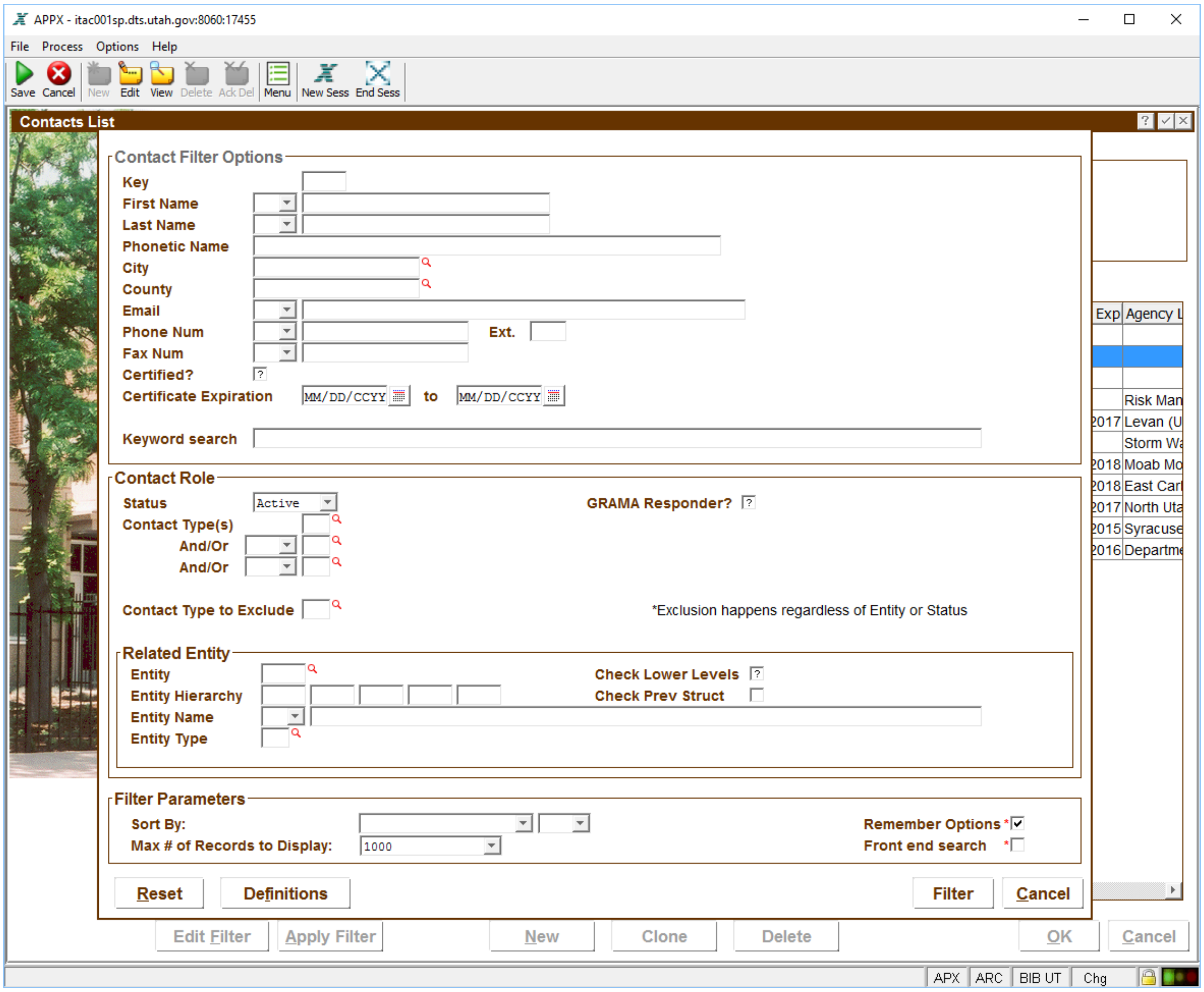


Double-click a row, or single-click and then click OK to view the record:

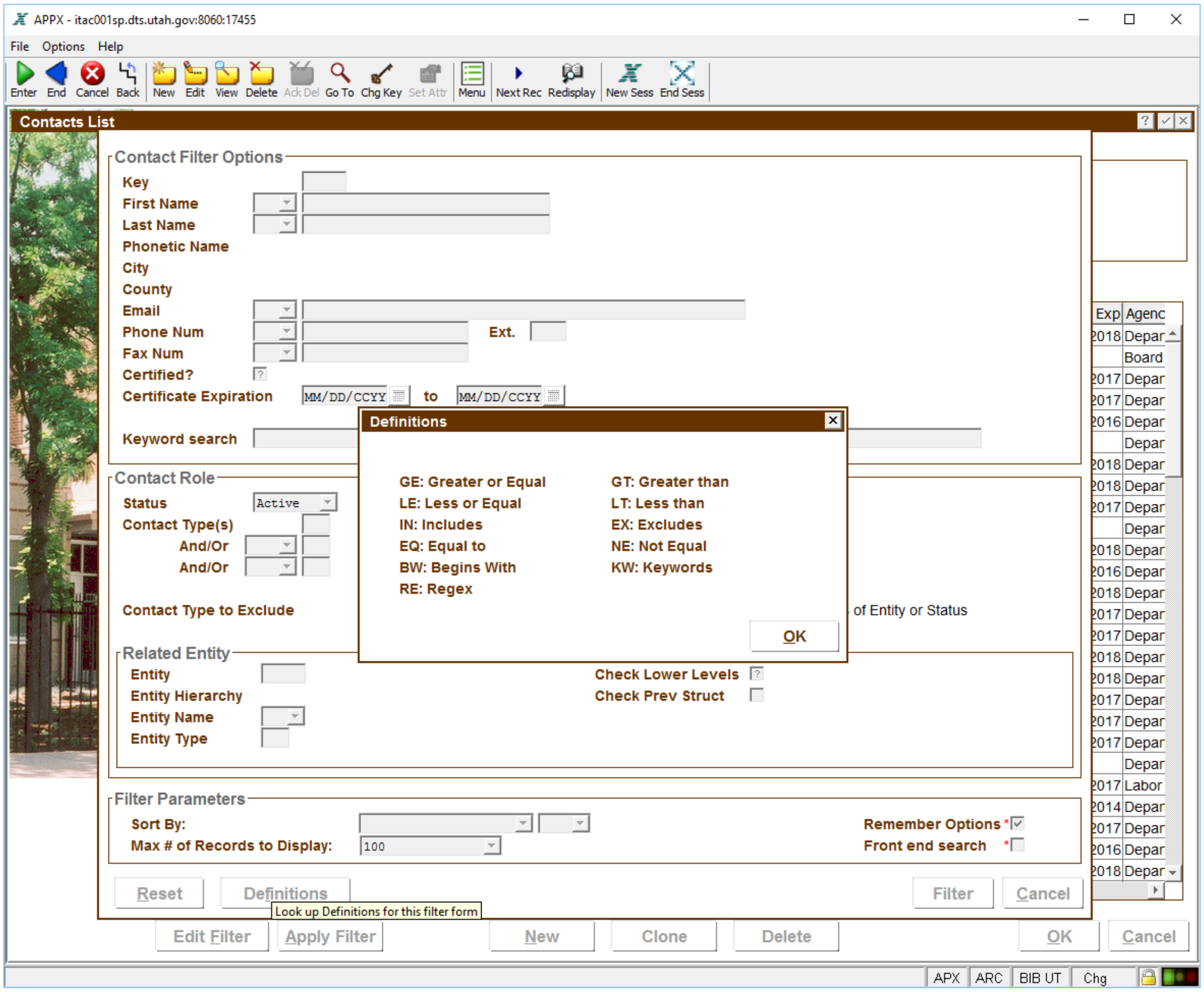


Click Cancel to go back to the previous screen.

Click Edit Filter.

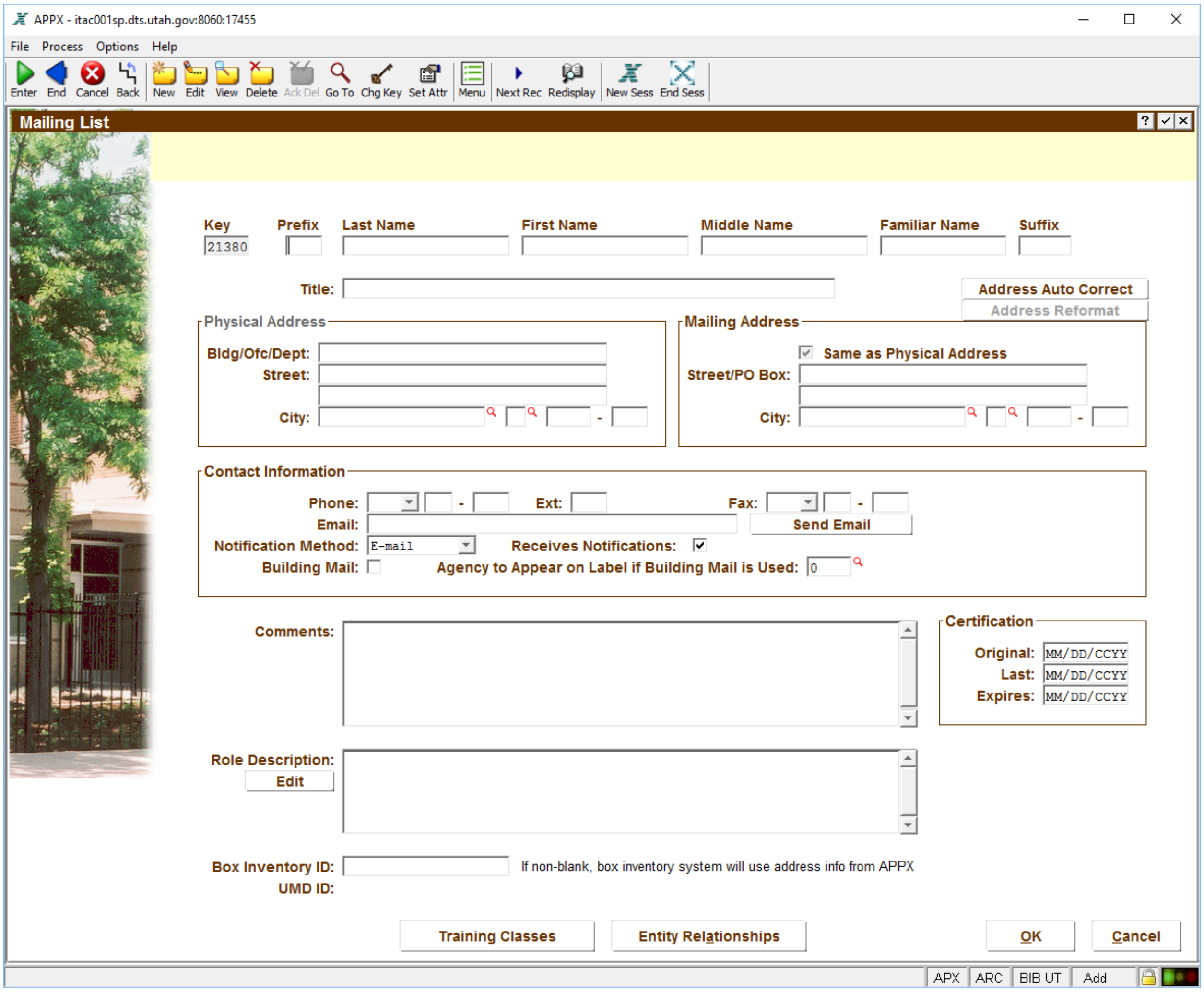


This screen allows you to do advanced searching, including some level of phonetic searching (not perfect, but better than nothing). You may filter by any combination of values and set it to remember those options. If you always want the filter screen to display instead of the simple search/table after clicking on the menu item, check the Front End Search checkbox. Click Reset to undo your filter choices back to the default, or click Filter to save them. If you set the max number of records to display to a smaller number, the table view will display faster when accessing it from the menu. The Definitions button offers a reminder of what the logical operators mean:



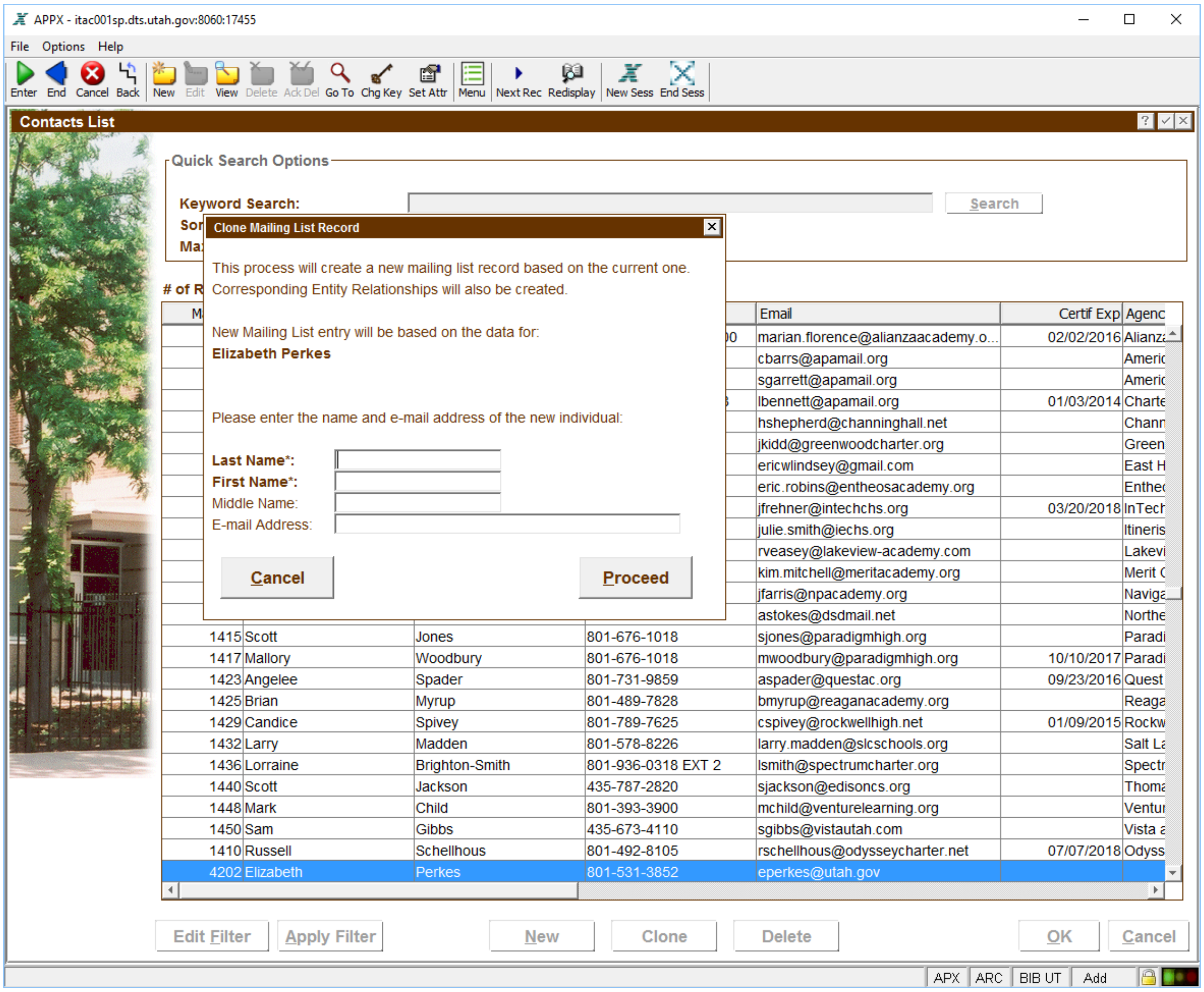
Click Cancel to return to the previous screen.

Click New to add a new record.

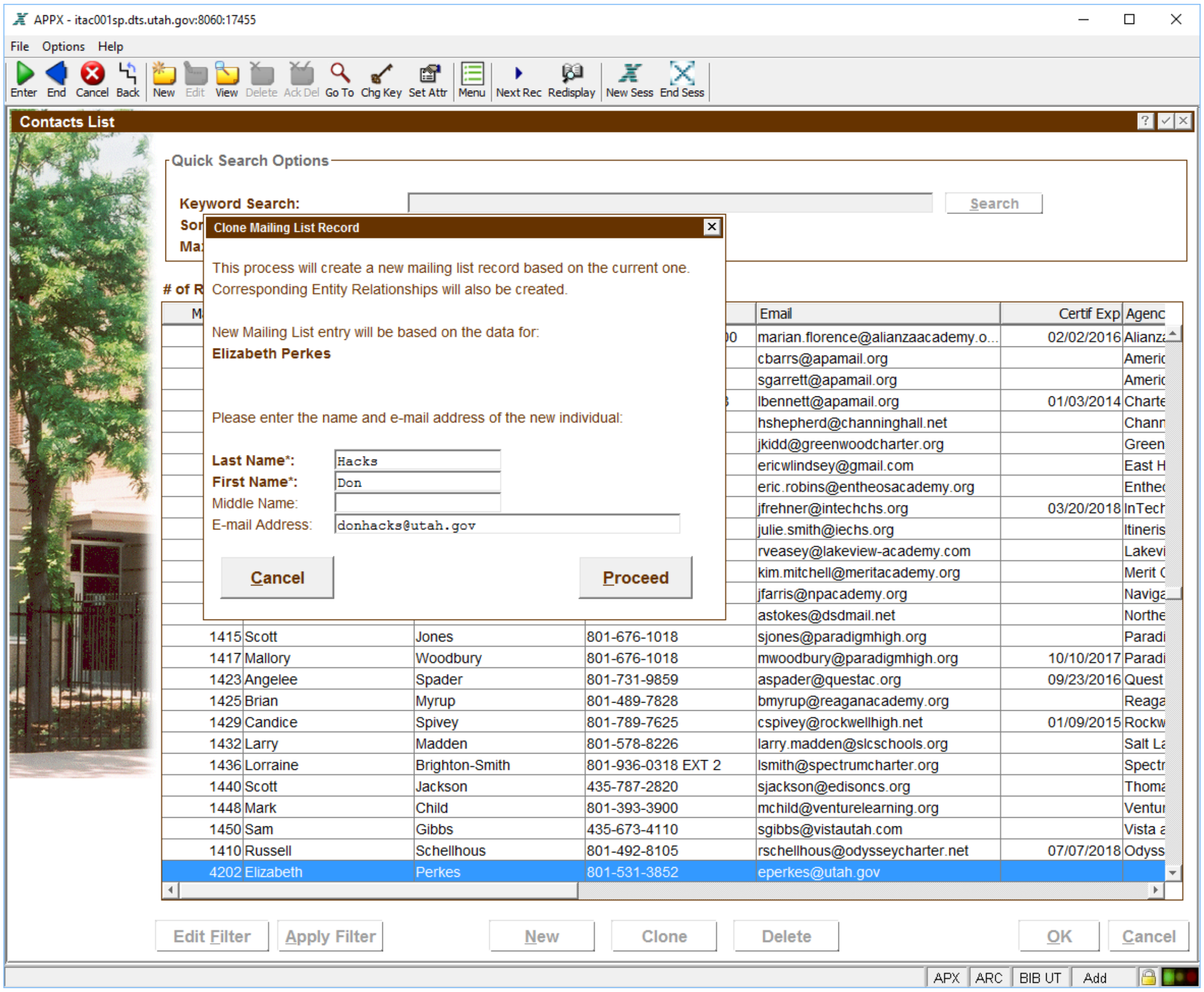


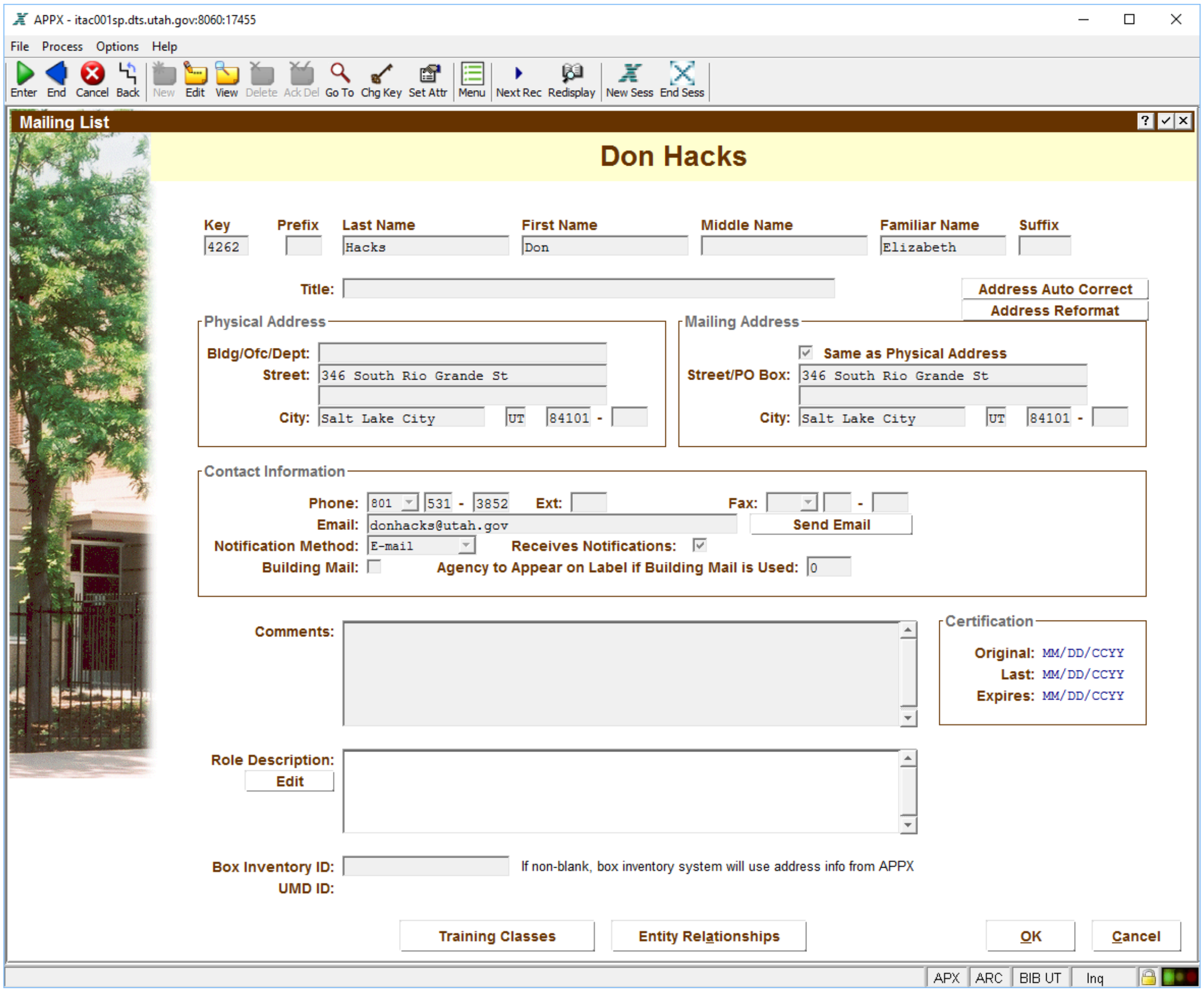
Edit as needed. Click OK to save your changes or Cancel to return to the previous screen.

If you want an existing record to serve as a model for a new mailing list record (such as a new records officer replacing an old one, tied to the same agencies), do not just type over the original person's name. Instead, select a record from the table and click Clone:



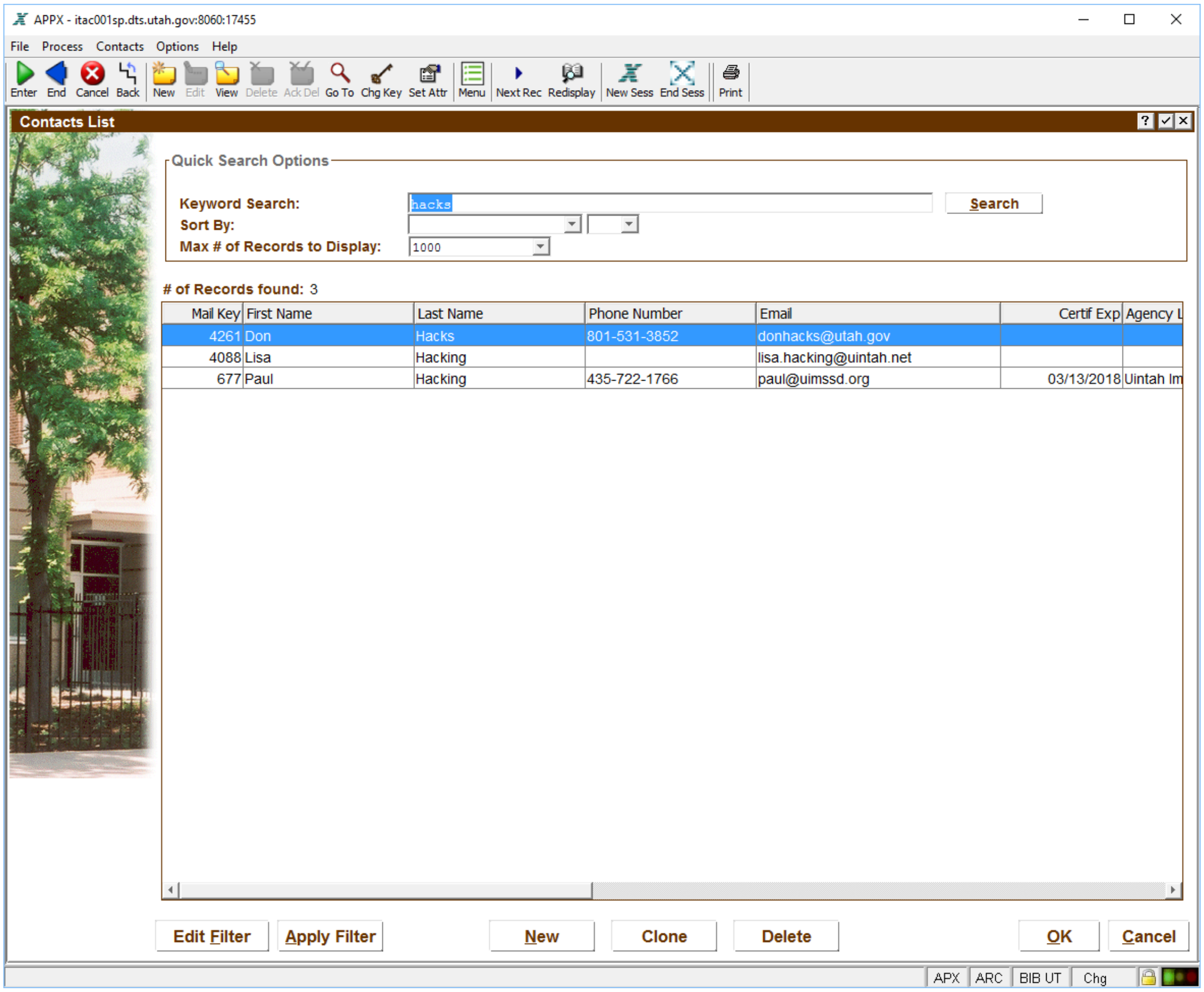
Then enter the name and email address of the new person and click Proceed:


APPX - itac001sp.dts.utah.gov:8060:17455
File Options Help
Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess
Contacts List
Quick Search Options
Keyword Search:
Search
Clone Mailing List Record
This process will create a new mailing list record based on the current one.
Corresponding Entity Relationships will also be created.
New Mailing List entry will be based on the data for:
Elizabeth Perkes
Please enter the name and e-mail address of the new individual:
Last Name*: Hacks
First Name*: Don
Middle Name:
E-mail Address: donhacks@utah.gov
Cancel
Proceed
Email
Certif Exp
Agenc
marian.florence@alianzaacademy.o... 02/02/2016
cbarrs@apamail.org
sgarrett@apamail.org
lbennett@apamail.org 01/03/2014
hshepherd@channinghall.net
jkidd@greenwoodcharter.org
ericwlindsey@gmail.com
eric.robins@entheosacademy.org
jfrehner@intechchs.org 03/20/2018
julie.smith@iechs.org
rveasey@lakeview-academy.com
kim.mitchell@meritacademy.org
jfarris@npacademy.org
astokes@dsdmail.net
1415 Scott Jones 801-676-1018 sjones@paradigmhigh.org
1417 Mallory Woodbury 801-676-1018 mwoodbury@paradigmhigh.org 10/10/2017
1423 Angelee Spader 801-731-9859 aspader@questac.org 09/23/2016
1425 Brian Myrup 801-489-7828 bmyrup@reaganacademy.org
1429 Candice Spivey 801-789-7625 cspivey@rockwellhigh.net 01/09/2015
1432 Larry Madden 801-578-8226 larry.madden@slcschools.org
1436 Lorraine Brighton-Smith 801-936-0318 EXT 2 lsmith@spectrumcharter.org
1440 Scott Jackson 435-787-2820 sjackson@edisoncs.org
1448 Mark Child 801-393-3900 mchild@venturelearning.org
1450 Sam Gibbs 435-673-4110 sgibbs@vistautah.com
1410 Russell Schellhous 801-492-8105 rschellhous@odysseycharter.net 07/07/2018
4202 Elizabeth Perkes 801-531-3852 eperkes@utah.gov
Edit Filter
Apply Filter
New
Clone
Delete
OK
Cancel
APX ARC BIB UT Add

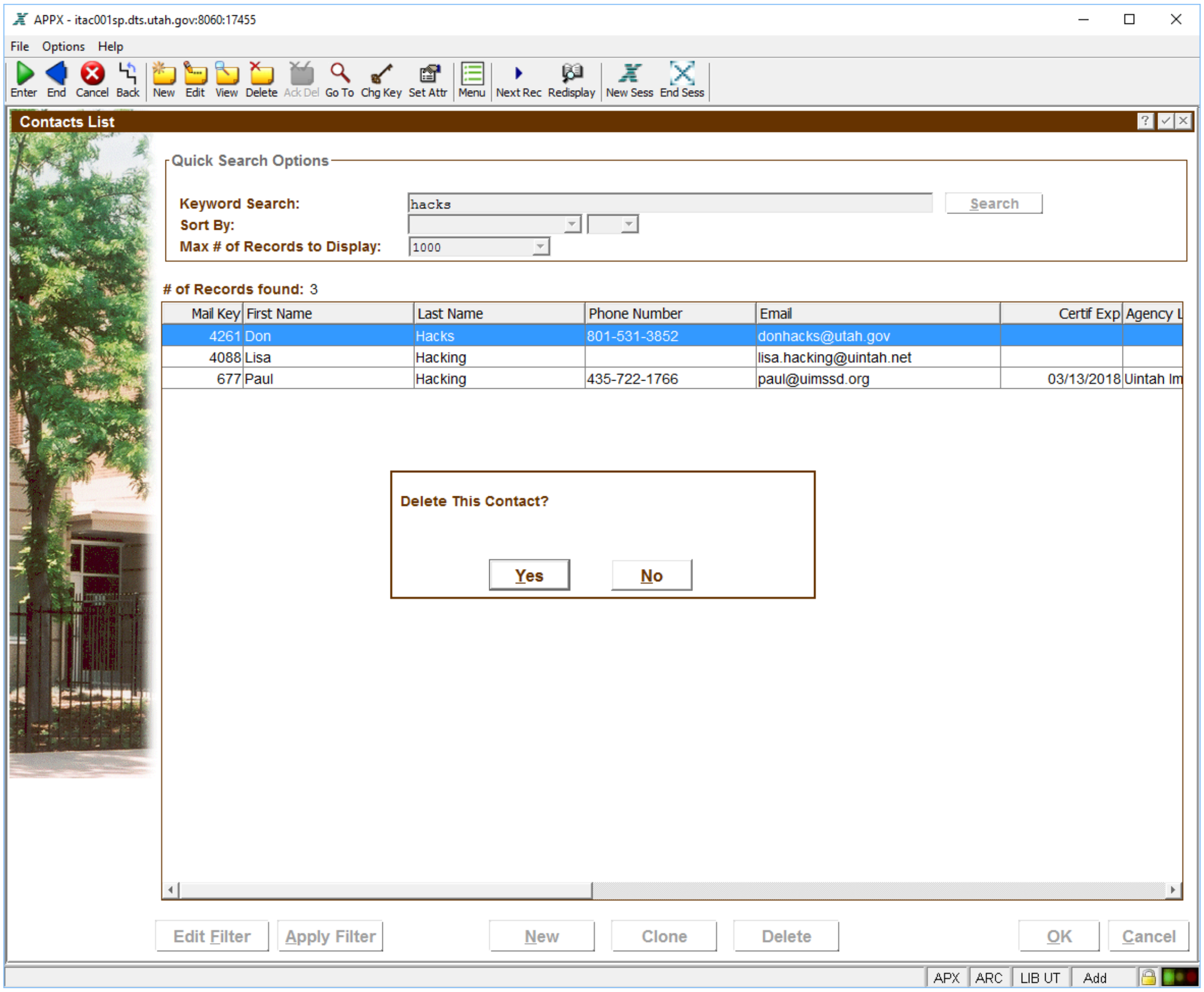


Edit this entry as needed. If the name being cloned has entity relationships, they will be the same in the new record.

To delete this entry, search for the name from the table list and click Delete:

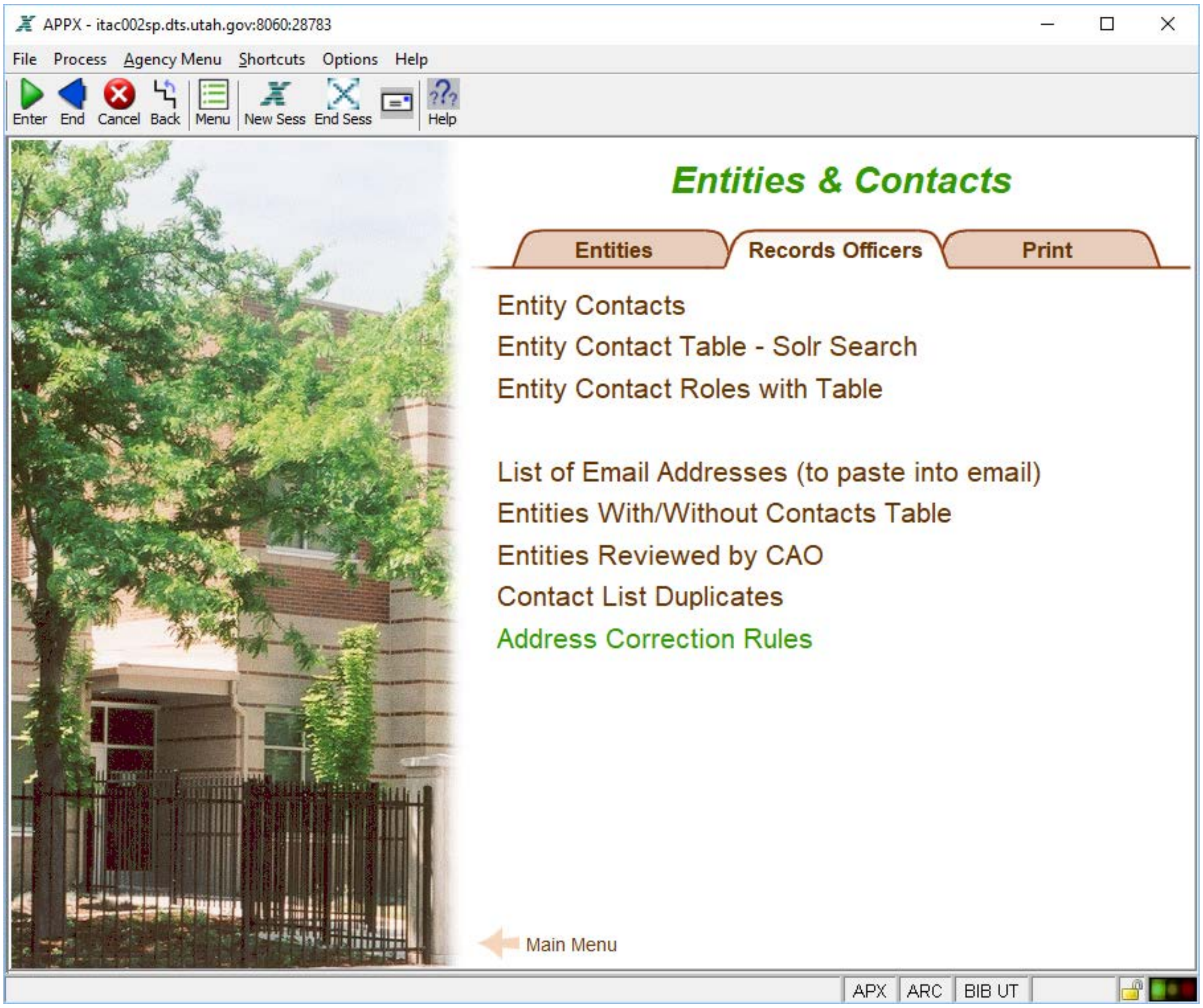


Indicate that the deletion is intended:

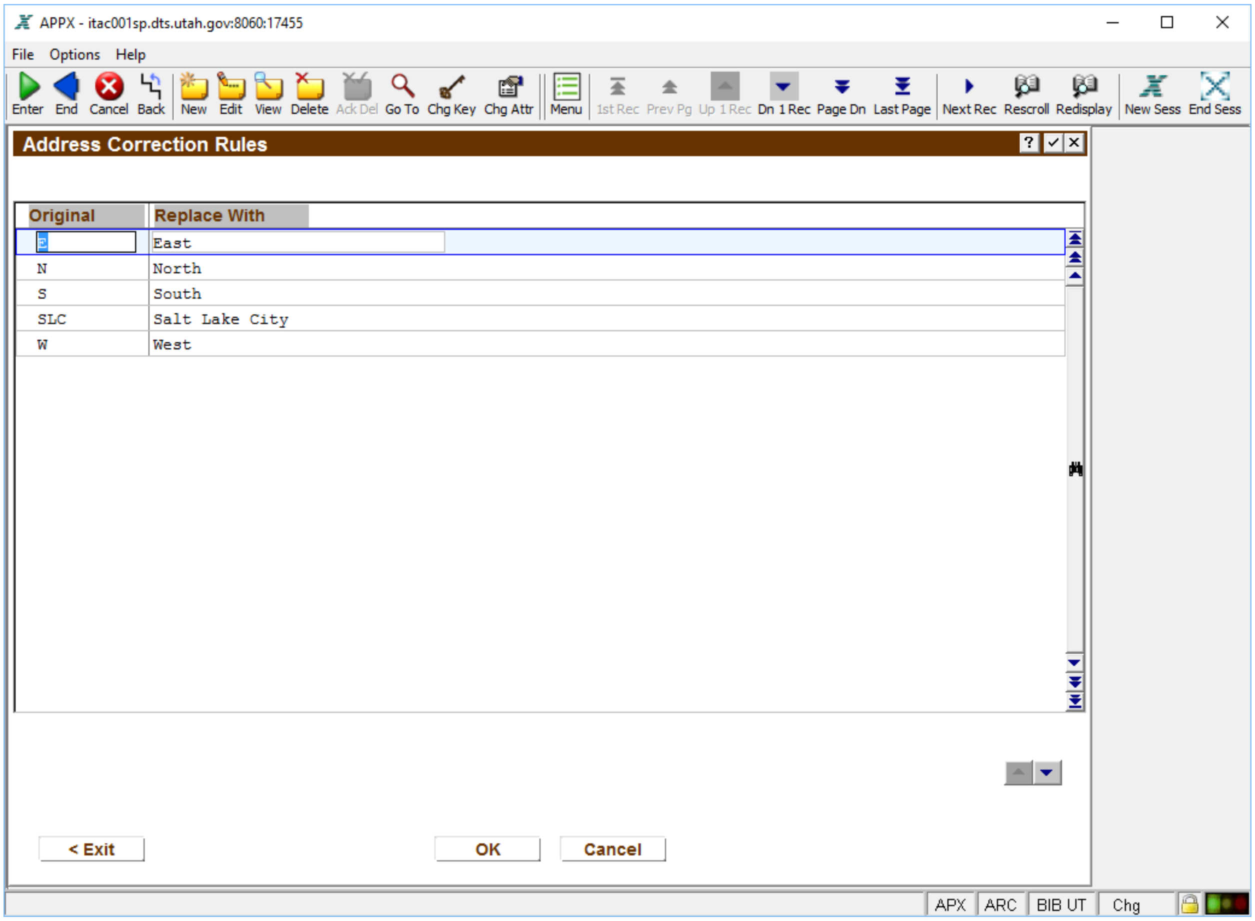


Click Yes and the name will be gone. Click Cancel to go back to the previous screen and Cancel again to go back to the menu.

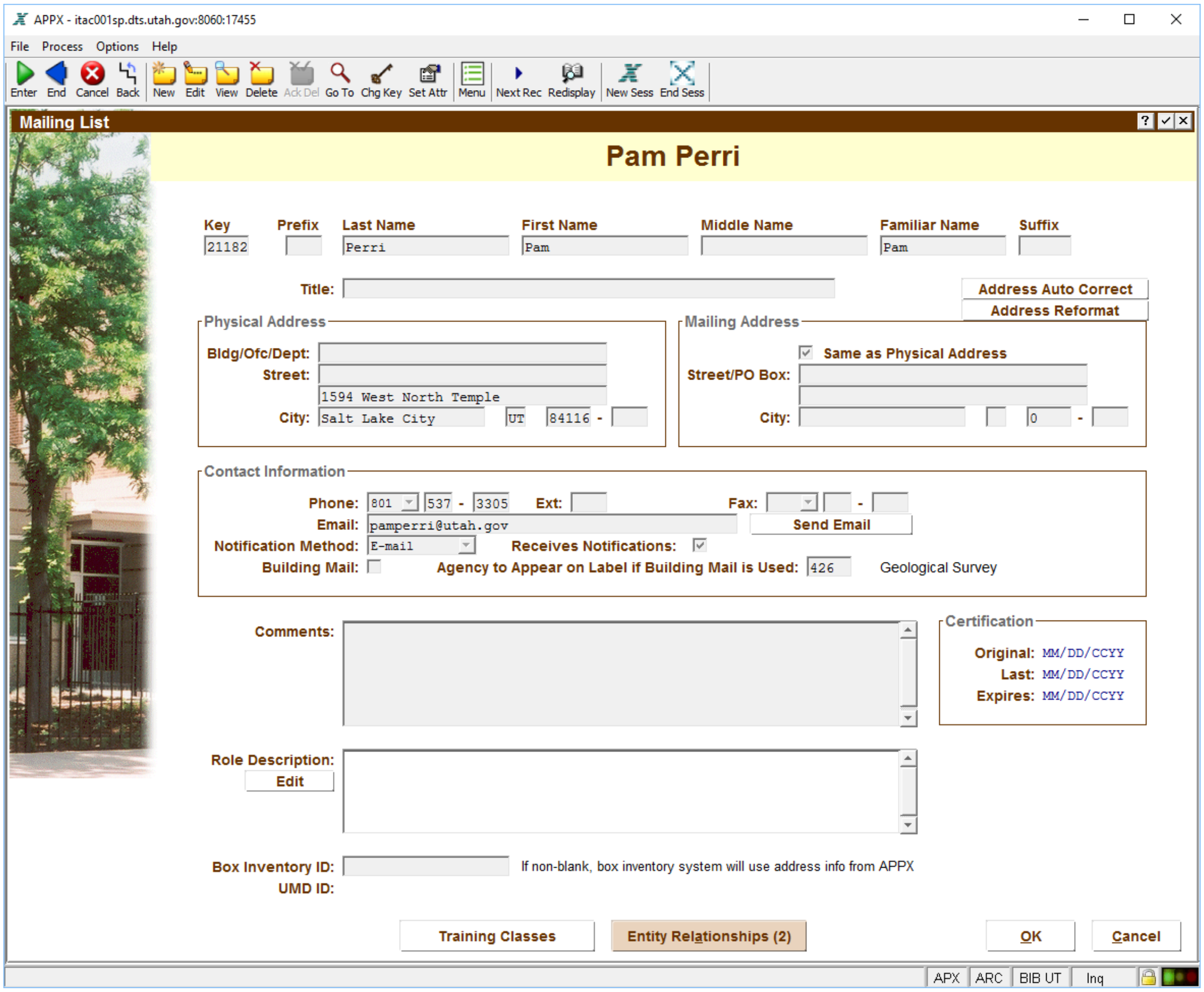
Click Address Correction Rules:



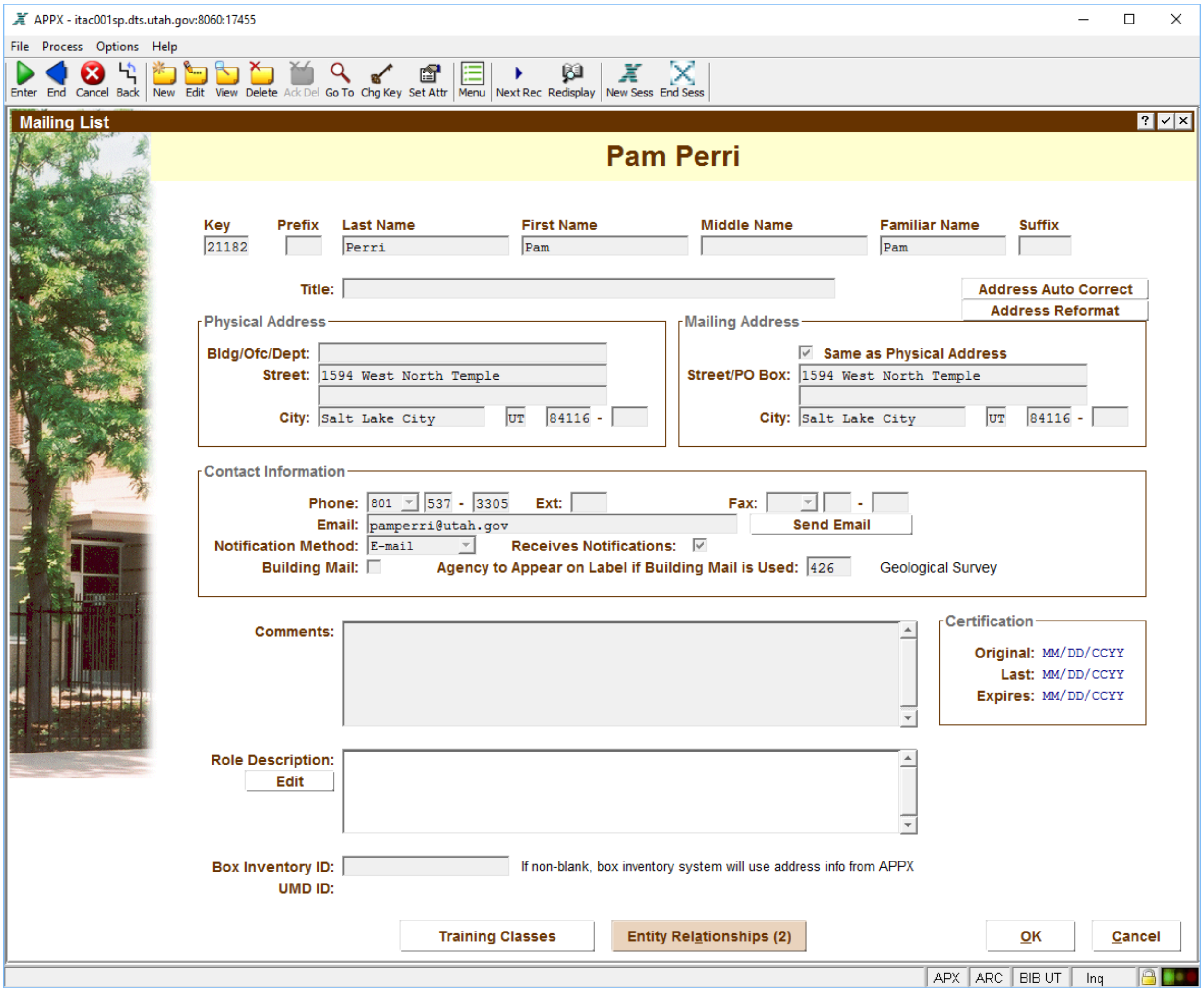
For any address element, the system will look for patterns as expressed here and replace them with the preferred term as names are added to the mailing list (whether through the client or the website), meaning ADD MODE ONLY. It will not auto-correct existing records (CHANGE MODE) without user action:



Add any useful terms needed. Note that address elements will automatically be changed to Title Case even if someone adds them all lower case or all caps. Click Cancel and return to Entity Contacts:



The Address Auto Correct button will apply the auto-correct rules to this existing record. The Address Reformat option will move address elements perceived to being a mailing address rather than a physical address to the Mailing Address set of fields, and place the physical address elements in their preferred spot:



APPX - itac001sp.dts.utah.gov:8060:17455
File Process Options Help
Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess
Mailing List
Pam Perri
Key 21182
Prefix
Last Name Perri
First Name Pam
Middle Name
Familiar Name Pam
Suffix
Title:
Address Auto Correct
Address Reformat
Physical Address
Bldg/Ofc/Dept:
Street: 1594 West North Temple
City: Salt Lake City UT 84116 -
Mailing Address
Same as Physical Address
Street/PO Box: 1594 West North Temple
City: Salt Lake City UT 84116 -
Contact Information
Phone: 801 537 - 3305
Ext:
Fax: -
Email: pamperri@utah.gov
Send Email
Notification Method: E-mail
Receives Notifications:
Building Mail:
Agency to Appear on Label if Building Mail is Used: 426
Geological Survey
Comments:
Certification
Original: MM/DD/CCYY
Last: MM/DD/CCYY
Expires: MM/DD/CCYY
Role Description:
Edit
Box Inventory ID:
If non-blank, box inventory system will use address info from APPX
UMD ID:
Training Classes
Entity Relationships (2)
OK
Cancel
APX ARC BIB UT Inq