

Email Administration March 2024

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Email Administration Overview

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

Email Preferences

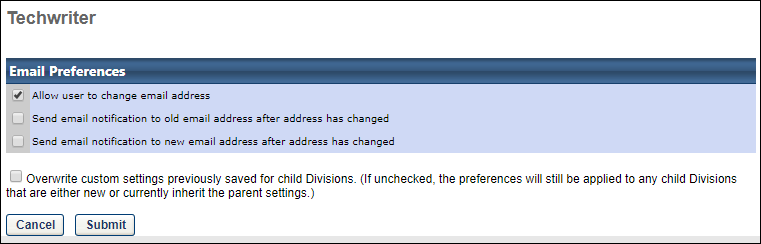
Email Preferences define end user's ability to change their email address and the associated email notifications when emails are changed. A great deal of Cornerstone workflow is triggered by email functionality. By defining who has the ability to change users emails and where the notification of such changes are to be sent, administrators ensure the appropriate levels of email security and flexibility for their organization. If these requirements vary at different organizational levels, Cornerstone gives you the ability to define email preferences specific to any organizational unit.

To manage Email Preferences, go to Admin > Tools > Core Functions > Core Preferences > Email.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email Preferences - Manage | Grants ability to manage Email Preferences, which includes defining end users' ability to change their email address and the associated email notifications when emails are changed. This is an administrator permission. | Core Administration |



Allow User to Change Email Address

When this option is selected, users have the option to change their email address via My Account. See My Account.

Send Email Notification to Old Email Address After Address Has Changed

When this option is selected, if a user changes their email address via My Account, the system generates an automatic email to the user's old email address, notifying the user that their email address has been changed. See My Account.

Send Email Notification to New Email Address After Address Has Changed

When this option is selected, if a user changes their email address via My Account, the system generates an automatic email to the user's new email address, notifying the user that their email address has been changed. See My Account.

Overwrite Settings

Select this option to overwrite custom settings for child division OUs. If you overwrite custom settings for child division OUs, the selected settings are applied to both new and existing child OUs. Any previously customized child OUs are updated with the selected settings.

* If there are no customizations to the child OU, then the parent OU customizations are applied to all child OUs.
* Overwrite custom settings checkbox setting
  + If this option is selected, all child OU customizations are deleted from the database, which means the parent OU customizations will be applied to new and existing child OUs.
  + If this option is unselected, all existing child OU customizations will remain unchanged, and any new child OUs will inherit the parent OU customizations by default.
* If a child OU has been customized to display any widgets, then regardless of the parent OU customizations, the child OU customizations are applied.
* If a child OU has been customized to hide all widgets, then parent OU customizations will take precedence and will be applied.

Email Digests Overview

An email digest is a scheduled email that is sent on a recurring basis. They are intended to group a user's notifications and reminders into a single email. Email digests are only sent to a user if there is active notification content for the user.

An email digest can contain standard and dynamic sections. Standard sections are sent to all recipients and are included any time an email digest is sent. Dynamic sections, such as the Training is Due section, are populated based on activity within the system. An email digest must contain at least one dynamic section, and the email digest will only be sent when a recipient has applicable content within a dynamic section. For example, a Training is Due email digest is only sent to a recipient when they have one or more training items that are due.

Email Digest Management

An email digest is a scheduled email that is sent on a recurring basis. They are intended to group a user's notifications and reminders into a single email. Email digests are only sent to a user if there is active notification content for the user.

The Email Digest Management page enables administrators to create, view, and manage email digests.

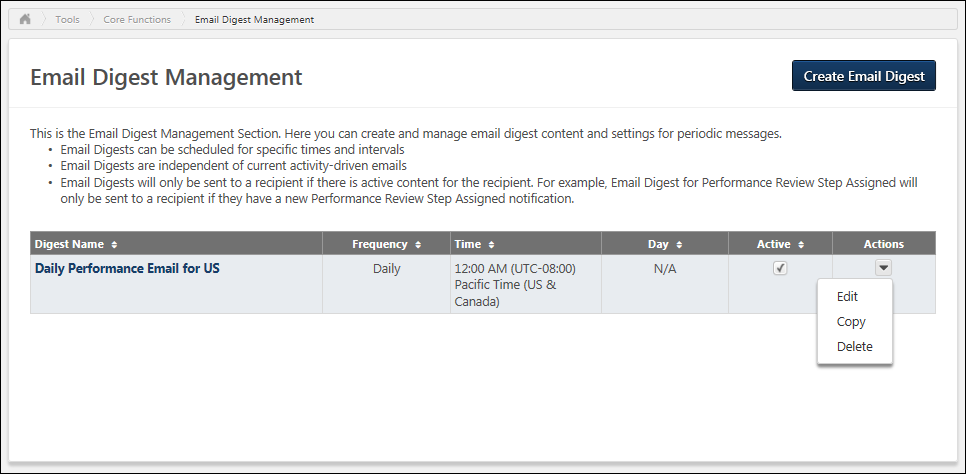
To manage email digests, go to Admin > Tools > Core Functions > Email Digest Management.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - Manage | Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission. | Performance - Administration |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - View | Grants ability to view email digests. This permission cannot be constrained. This is an administrator permission. | Performance - Administration |



Create Email Digest

To create an email digest, select the Create Email Digest button. See Email Digest - Create/Edit on page 7 for additional information.

Email Digest Table

By default, the email digest table displays email digests in alphabetical order. The table can be sorted by one of the table columns by selecting the appropriate column header.

The following information is displayed for each existing email digest in the table:

* Digest Name - This displays the name that was configured for the email digest.
  + Administrators with permission to manage email digests may select the digest name to edit the email digest.
  + Administrators with permission to view email digests may select the digest name to view the email digest.
* Frequency - This displays how frequently the email digest may be sent to recipients. If there is no content to be sent to a user, then the email digest is not sent.
* Time - This displays the specific time at which the email digest is sent.
* Day - If the email digest is sent on a weekly basis, this displays the day of the week on which the email digest is sent. If the email digest is sent on a monthly basis, this displays the date on which the email digest is sent.
* Active - Select this checkbox to make the email digest active. When an email digest is not active, it is not sent to users. This option is not available if the administrator does not have permission to manage email digests.

Email Digest Actions

To view the available actions for an email digest, click the drop-down icon  in the Actions column. The following actions may be available:

* Edit - Select this option to edit the email digest. This option is only available if the administrator has permission to manage email digests. See Email Digest - Create/Edit on page 7 for additional information.
* Copy - Select this option to copy the email digest. This option is only available if the administrator has permission to manage email digests. See Email Digest - Create/Edit on page 7 for additional information.
* View Log - Select this option to generate a .csv file that contains the following information for each time the email digest was sent in the past 30 days:
  + Email Address - This displays the email address of the intended email digest recipient.
  + Username - This displays the username of the intended email digest recipient.
  + Status - This displays the status of the delivery. If an error was received, then the cause of the error is displayed. For example, "User has no associated email address" may be displayed.
  + Time Sent - This is the time at which the email processor sent or attempted to send the email. This is displayed in the user's time zone.
* Delete - Select this option to delete the email digest. This option is only available if the administrator has permission to manage email digests. When this option is selected, a confirmation pop-up opens to confirm the action.
* View - Select this option to view the email digest. This option is only available if the administrator does not have permission to manage email digests.

Email Digest - Create/Edit

An email digest is a scheduled email that is sent on a recurring basis. They are intended to group a user's notifications and reminders into a single email. Email digests are only sent to a user if there is active notification content for the user.

An email digest can contain standard and dynamic sections. Standard sections are sent to all recipients and are included any time an email digest is sent. Dynamic sections, such as the Training is Due section, are populated based on activity within the system. An email digest must contain at least one dynamic section, and the email digest will only be sent when a recipient has applicable content within a dynamic section. For example, a Training is Due email digest is only sent to a recipient when they have one or more training items that are due.

To manage email digests, go to Admin > Tools > Core Functions > Email Digest Management.

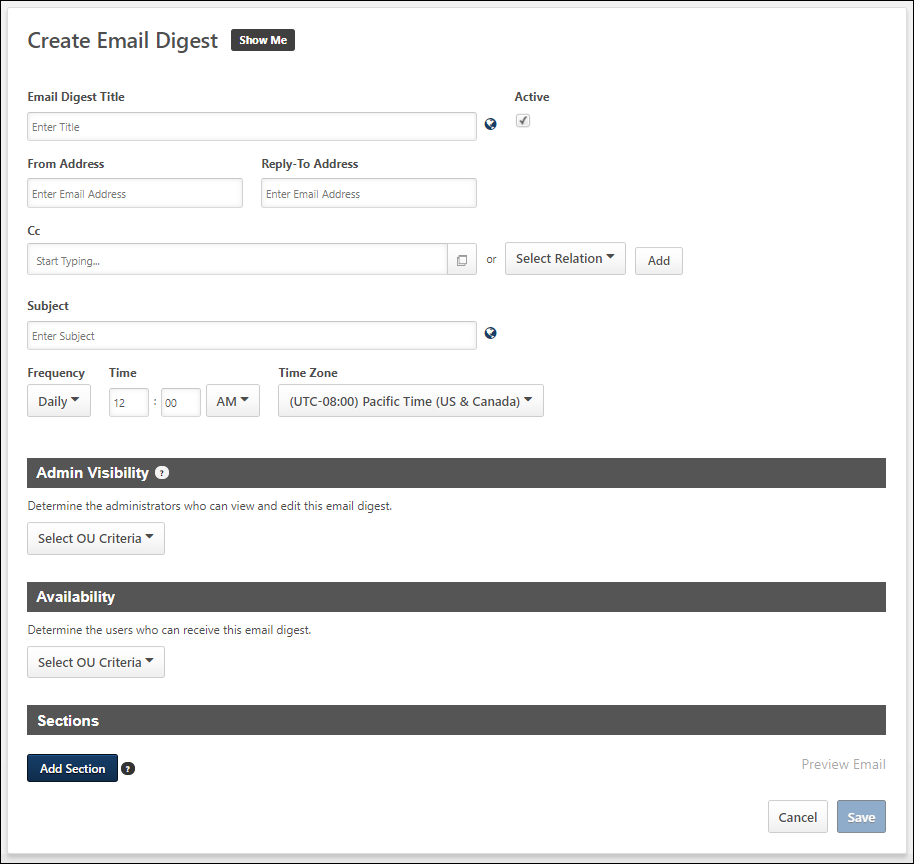
* To create an email digest, click the Create Email Digest button.
* To copy an email digest, click the drop-down icon  to the right of the email digest and select Copy.
* To edit an email digest, click the drop-down icon  to the right of the email digest and select Edit.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - Manage | Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission. | Performance - Administration |

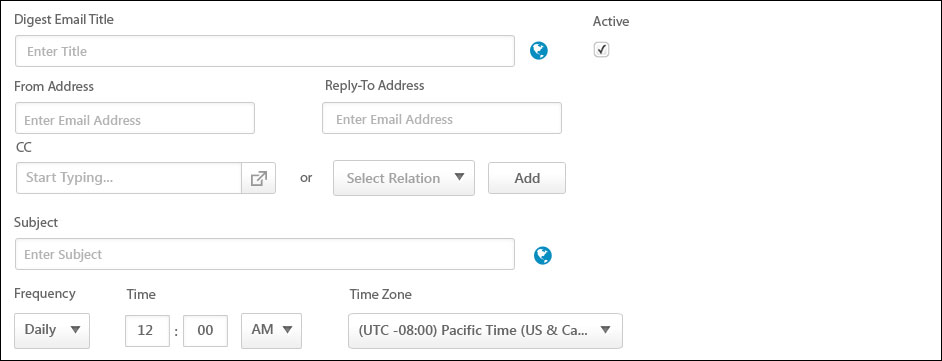
|  |  |  |
| --- | --- | --- |
| Email Digest Administration - View | Grants ability to view email digests. This permission cannot be constrained. This is an administrator permission. | Performance - Administration |



General Details

The following fields are available in the upper section of the page:

* Digest Email Title - Enter a title for the email digest, up to 255 characters. This field is required. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.
* Active - Select this box to activate the email digest. When an email digest is not active, the email digest is not sent to users.
* From Address - Enter the email address from which the email digest will be sent. This field is required. Email addresses must be entered in a valid email address format.
* Reply-To Address - Enter the email address to which any replies to the email digest will be sent. Email addresses must be entered in a valid email address format.
* CC - A copy or carbon copy (CC) of the email digest can be sent to a specific user or a role. To add a CC user or role, select the appropriate user or role, and then click the Add button.
  + To select a specific user, either enter the user's name in the field or click the Select icon  to select a user from the system. See Select User Pop-up for additional information.
  + To select a role, select the appropriate role from the drop-down menu.
* Subject - Enter a subject for the email digest. The subject is displayed to the recipient. Tags cannot be used in this field. This field is required. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.
* Frequency - From the drop-down, select how often the email digest will be sent to users. The email digest contains all appropriate notifications from the previous period (e.g., day, week, month), depending on the selected frequency. Email digests only trigger if there is active and applicable content for the recipient. The following options are available:
  + Daily - When this option is selected, the email digest is sent every day at the specified time. The time and time zone at which the email digest will be sent must be specified. If the specified time is modified, then the email digest contains all notifications since the last email digest was sent, up to a 48 hour period.
  + Weekly - When this option is selected, the email digest is sent every week on a specific day and time. The day of the week, time, and time zone at which the email digest will be sent must be specified. If the specified time is modified, then the email digest contains all notifications since the last email digest was sent, up to a two week period.
  + Monthly - When this option is selected, the email digest is sent every month on a specific date and time. The day of the month, time, and time zone at which the email digest will be sent must be specified. If the selected date does not exist in the month, then the email digest is sent on the nearest previous date. For example, if 30th is selected, then the email digest would be sent on February 28th. If the specified time is modified, then the email digest contains all notifications since the last email digest was sent, up to a two month period.



Why is the meeting date one day behind on my email digest? Why did I receive a past meeting in my upcoming check-in digest?

If the configured email digest time zone widely differs from the recipient’s time zone, users may see the meeting dates a day behind the email digest date.

Therefore, it is highly recommend that each region have their own digest. This will keep the notifications relevant to their location.

A user who was included in the email digest and should have received the email digest did not receive it. Why?

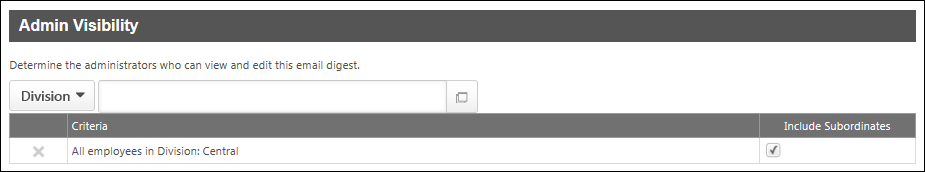
Normally, users who are configured to receive an email digest will be processed by the digest within 1-2 of hours of the scheduled email digest send time. Digest emails are generated about one hour before sending, so changes to the digest settings close to the time that emails are generated are not guaranteed to be incorporated by the email digest. However, changes should be reflected in subsequent digest emails. To ensure the accuracy of included users and other digest settings, ensure there are several hours between the time you edit the digest and the digest's send time.

Admin Visibility

This section determines which administrators can view and edit the email digest. Administrators must be within the selected criteria to view and edit the email digest. In addition, the administrator must have permission to manage Email Digest Administration.

To add a criterion, select the appropriate organizational unit (OU) type from the drop-down. Then, either enter the name of the OU in the field or click the Select icon  to select an OU from the system. Select the Include Subordinates checkbox to also include any subordinate OUs.

This is optional. Unless visibility is specified, all administrators with the proper permissions can view and edit the email digest.



Availability

This section limits which users are able to receive the email digest. This enables organizations to customize or brand email digests differently for different groups of users.

Availability must be set for the email digest. To add a criterion, select the appropriate organizational unit (OU) type from the drop-down. Then, either enter the name of the OU in the field or click the Select icon  to select an OU from the system. Select the Include Subordinates checkbox to also include any subordinate OUs.

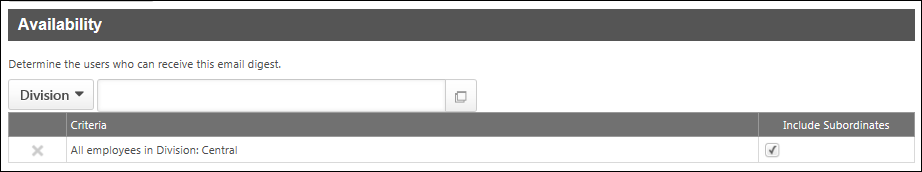
When an administrator creates an email digest, the constraints on the administrator's Email Digest Administration - Manage permission are automatically applied to the availability of the email digest. These are referred to as creator constraints. For example, if the administrator's Email Digest Administration - Manage permission is constrained to Location: United States, then the availability of any email digest the administrator creates is automatically limited to Location: United States.

When applicable, the creator constraints are displayed above the criteria table. Any availability that is selected will further constrain the availability of the email digest.

Note: Email digests are only sent to a user if there is active content for the user.

The following considerations apply when setting availability:

* Verify that the correct time zones are set for your users based on their geographic location. See Time Zone Application Rules.
* If the recipients of the email digest have extreme time zone differences (over 6 hours of difference), then it is recommended that each region have their own digest. This will keep the notifications relevant to their location.



Sections

This section enables administrators to add and configure standard and dynamic sections within the email digest.

Add Section

An email digest can contain standard and dynamic sections. Standard sections are sent to all recipients and are included any time an email digest is sent. Dynamic sections, such as the Training is Due section, are populated based on activity within the system. An email digest must contain at least one dynamic section, and the email digest will only be sent when a recipient has applicable content within a dynamic section. For example, a Training is Due email digest is only sent to a recipient when they have one or more training items that are due.

Click the Add Section button to add a new section to the email digest. See Email Digest - Add Section on page 14 for additional information.

Configure Section

The following properties can be configured for a section:

* Section Name - Enter a name for the section, up to 100 characters. This name should indicate the purpose of the section, such as Email Digest Header or Review Step Assigned to Reviewer. This is required. If multiple languages are enabled for your portal, select the Translate icon to translate the field into other available languages.
* Send To - Select to whom the email digest section should be sent. This field is required. Because Standard sections are always sent to all users within the email digest's availability, this option is only available for non-Standard sections. To add a user or relation, select the appropriate user or relation, and then click the Add button.
  + To select a specific user, either enter the user's name in the field or click the Select icon  to select a user from the system. See Select User Pop-up for additional information.
  + To select a relation, select the appropriate relation from the drop-down menu. The type of section determines which relations are available.
* Body - To edit the body of the email section, click the Edit Body button. This opens the Edit Section pop-up. See Email Digest - Edit Section Body on page 18 for additional information.

Move Section

The sections can be moved up or down so that they appear in the proper order. For example, the Email Digest Header section should appear first, and the Email Digest Footer section should appear last.

* To move a section upward, click the up icon .
* To move a section downward, click the down icon .

Remove Section

To remove a section from the email digest, click the Delete icon . A pop-up opens to confirm the section deletion.

Preview Email

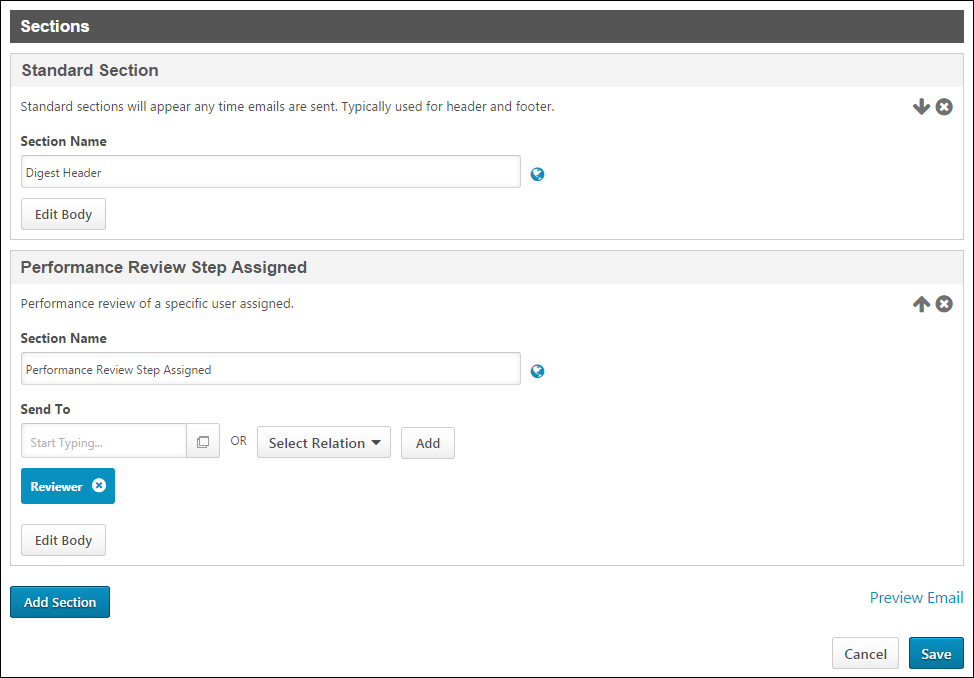
Click the Preview Email link to view how the email will appear to recipients. The preview is opened in a pop-up. All of the HTML in the sections is rendered properly except for <script> tags. Also, email tags are displayed as text.

The Preview Email link is not available if no sections have been added to the email digest.

Save or Cancel

Click Save to save the email digest. This button is not available if no sections have been added to the email digest.

Click Cancel to cancel the email digest creation or any unsaved changes to the email digest.



Email Digest - Add Section

An email digest can contain standard and dynamic sections. Standard sections are sent to all recipients and are included any time an email digest is sent. Dynamic sections, such as the Training is Due section, are populated based on activity within the system. An email digest must contain at least one dynamic section, and the email digest will only be sent when a recipient has applicable content within a dynamic section. For example, a Training is Due email digest is only sent to a recipient when they have one or more training items that are due.

By default, a standard section is added to the email digest. As a best practice, a standard section should be included as the first and last sections of the email digest to provide introduction and closing text for the email digest.

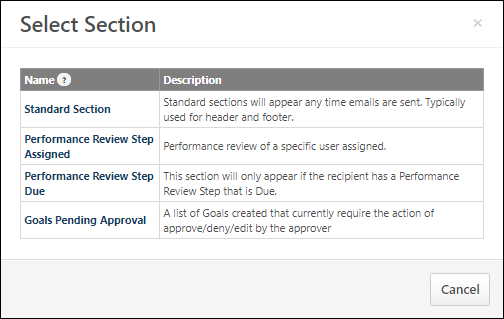
To add a section to an email digest, click the Add Section button in the Sections section.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - Manage | Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission. | Performance - Administration |

Note: This image does not include all available sections.



Sections Table

The Select Section pop-up displays all sections that are available to the administrator. The following information is displayed for each available section:

* Name
* Description

The following email digest sections may be available:

Standard Sections

* Standard Section - This section type is a multipurpose section that is always included when added to an email digest. That is, if a standard section is added to an email digest, it is always included when an email digest is sent to a recipient.

Core/General Sections

* Feedback Assignment Section - This email digest section is intended to alert or remind recipients that they have been assigned a feedback action item. See Skill Rating and Feedback Sections on page 34 for additional information.
* Skill Endorsements Section - This email digest section is intended to alert recipients that they have received skill endorsements. See Skill Rating and Feedback Sections on page 34 for additional information.
* Skill Feedback Section - This email digest section is intended to alert recipients that they have received skill feedback. See Skill Rating and Feedback Sections on page 34 for additional information.
* Skill Feedback Requests Section - This email digest section is intended to alert recipients that they have received responses to their skill feedback requests. See Skill Rating and Feedback Sections on page 34 for additional information.

Connect Sections

* Communities Postings - This dynamic section is intended to alert recipients that there is one or more new postings available in the recipient's Connect communities. This dynamic section can be configured to display the details of each new posting. If there has not been a new community posting that is available to the user since the last digest was delivered, then this section is not included in the email digest for the user. See Email Digest - Community Postings Section on page 39 for additional information.
* Team Feed Updates - This dynamic section is intended to alert recipients that there is one or more new user updates available in the recipient's Connect team feeds. This dynamic section can be configured to display the details of each new team feed update. If there has not been a new team feed update that is available to the user since the last digest was delivered, then this section is not included in the email digest for the user. See Email Digest - Team Feed Updates Section on page 45 for additional information.
* Team Tasks Summary - This dynamic section is intended to alert recipients that there is one or more active team tasks available in the recipient's Connect teams. This dynamic section can be configured to display the details of each active team task. If there is not an active team task that is available to the user, then this section is not included in the email digest for the user. [***See Team Tasks Summary Section for additional information.***](#_Ref-1896870582)

Learning Sections

* Playlist Item Added - If a user is following at least one playlist which is updated with new content, when an email digest containing a Playlist Item Added section is deployed, the user receives an email with information about the updated playlist, as configured by an administrator. Administrators can create a Playlist Item Added section within an email digest and create an email body using playlist-specific tags, which helps provide users with relevant information about their followed playlists. See Email Digest - Playlist Item Added Section on page 41 for additional information.
* Training Assigned - The Training Assigned section is a dynamic section intended to alert managers and learners that a new learning object (LO) has been assigned to the learner. Instead of receiving separate emails for each individual training assignment, a Training Assigned email digest section can be configured to consolidate all Training Assigned email notifications into a single email digest, based on a specified frequency. See Email Digest - Training Assigned Section on page 49 for additional information.
* Training Due - The Training Due section is a dynamic section intended to alert managers and learners that the due date for a learning object (LO) assigned to the trainee is approaching. Instead of receiving separate emails for each individual training assignment, a Training Due email digest section can be configured to consolidate all Training Due email notifications into a single email digest, based on a specified frequency. See Email Digest - Training Due Section on page 52 for additional information.

Careers/Performance Sections

* Check-Ins Follow-Ups Assigned - This section alerts participants that a new Follow-Up action item is assigned. In addition to their individually assigned Follow-ups, the recipient will also receive notice of unassigned Follow-Ups. See Check-Ins - Email Digest Management on page 22 for additional information.
* Check-Ins Follow-Ups Overdue - This section alerts participants that the due date for a Follow-Up has passed. Follow-Ups that were created more than three months ago will not be included in this digest. See Check-Ins - Email Digest Management on page 22 for additional information.
* Compensation Task Due: Task Approver - This dynamic section is intended to alert recipients that there is one or more compensation task that requires their approval. This dynamic section can be configured to display the details of each compensation task that requires approval. If a user does not have any compensation tasks that require approval based on the section's reminder settings, then this section is not included in the email digest for the user. See Email Digest - Compensation Task Due: Task Approver Section on page 25 for additional information.
* Goals Pending Approval - This section inform approvers of the list of goals created and requiring their actions. See Email Digest - Goals Pending Approval Section on page 27 for additional information.
* Missed Check-Ins - The Missed Check-Ins section is a list of check-ins that the participant scheduled, but a meeting was not created for the last scheduled date. The digest looks at the Meeting Frequency for the scheduled check-ins and informs users of their missed meetings. See Check-Ins - Email Digest Management on page 22 for additional information.
* Performance Review Step Assigned - This email digest section is intended to alert recipients that they have been assigned one or more performance review steps. This section can be configured to display the details of each new performance review step assignment, including reopened steps. If a user has not been assigned a performance review step since the last digest was delivered, then this section is not included in the email digest for the user.See Email Digest - Performance Review Step Assigned Section on page 28 for additional information.
* Performance Review Step Due - This dynamic section is intended to alert recipients that there is one or more performance review steps that are due. This dynamic section can be configured to display the details of each new performance review step that is due. If a user does not have any performance review steps that are due based on the section's reminder settings, then this section is not included in the email digest for the user. See Email Digest - Performance Review Step Due Section on page 30 for additional information.
* Recent Check-Ins - The Recent Check-Ins section is a list of check-ins with the meetings scheduled for the participant since the previous email was sent. For example, if the digest frequency is weekly, the digest will include all of the meetings scheduled in the last seven days. See Check-Ins - Email Digest Management on page 22 for additional information.
* Upcoming Check-Ins - The Upcoming Check-Ins section is a list of check-ins with the meetings scheduled for the participant before the next email will be sent. The digest looks at the Meeting Frequency for the scheduled check-ins and informs users of their upcoming recurring meetings. See Check-Ins - Email Digest Management on page 22 for additional information.

Add Section

To add a section to the email digest, select the section name. The pop-up is automatically closed, and the new section is added to the bottom of the Sections section.

Cancel

To cancel the section addition, select the Cancel button.

Email Digest - Edit Section Body

When an email digest section is added to an email digest, the body of the section can be configured so that the appropriate messaging and information is displayed for recipients.

To edit an email digest section body, add the appropriate section to the email digest and click the Edit Body button.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - Manage | Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission. | Performance - Administration |

When editing an email digest section body, the following options are available:

Language

If multiple languages are enabled for your portal, select a language from drop-down menu. The default value is the default language of the administrator who created the email digest.

The text that is entered in the section body should be entered in the selected language. When the email digest is sent to a user, the recipients receive the email digest in their preferred language. If content is not available in their preferred language, then the recipient receives the email digest in the language of the administrator who created the email digest.

Tags

Click the Display a list of tags link to view tags available to use in the section body. When the email is sent, the tags are replaced with actual information. The tags must be entered exactly as they are listed, and they are case sensitive. For example, to address the email to the email recipient, enter: "Dear {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME}," and the fields would be replaced with the relevant information.

Note: Tags used in email digests must be contained between the LIST.BEGIN and LIST.END tags, or the included tags will not function properly.

Which tags are available to include is dependent upon the email digest section type. Review the specific dynamic section topic to view the available tags for that dynamic section type.

My tags aren't working. What do I do?

Tags are case-sensitive. Please make sure all the tags are in uppercase letters.

{LIST.BEGIN} and {LIST.END} are repeater tags that are used for a section that displays all of the items assigned to a user. Please ensure that the tags are enclosed within the {LIST.BEGIN} and {LIST.END} tags in your email body.

Standard Section Tags

The following tags are available for standard sections:

* RECIPIENT.FIRST.NAME - This displays the first name of the user who is receiving the email.
* RECIPIENT.LAST.NAME - This displays the last name of the user who is receiving the email.

Section Body

Enter the message for recipient. The following options are available for configuring the message:

* Tags - Tags may be used in this field. To view a list of available tags, click the Display a list of tags link.
* WYSIWYG Tool - The WYSIWYG (What You See Is What You Get) tool provides configuration tools, such as images, fonts, colors, formatting, and tables. There is also a Copy from Word feature that enables administrators to import from Microsoft Word, preserving the formatting used in the Word document. HTML code can also be used. All of the HTML in the sections is rendered properly except for <script> tags.
  + The top toolbar of the WYSIWYG tool contains configuration options. The bottom toolbar is used to switch from design to HTML mode, as well as preview the email.
  + Note: Documents cannot be deleted from the Document Manager once they are added. This is because the document may be in use in emails that have already been sent to users. This prevents errors with document links after emails are sent.
  + See the WYSIWYG Tool Considerations below for important considerations when using the WYSIWYG tool.

Done or Cancel

To save the section body, click Done. Otherwise, click Cancel to discard any unsaved changes.

WYSIWYG Tool Considerations

The following are important considerations when using the WYSIWYG tool:

* The Telerik editor demo website ([**http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx**](http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx)) is provided for reference purposes only. The editor available in Email Administration is a different version than the demo editor on the website, and there may be features that work differently or are missing. Hence, all features of the editor may not function in the same way as demonstrated in the demo editor.
* Editor Limitations:
  + Microsoft Outlook does not display media files embedded in the editor.
  + The paste feature may not paste some HTML content when done in the Design mode, for example "iframes." This can be done via HTML mode instead.
  + Some media file codes are taken in by the editor but may not display in the emails received by the user.
  + HTM files successfully uploaded via the Document Manager in the editor may not be displayed accurately in Outlook.
  + Preview may not be identical to how a specific email client renders the email.
  + "Paste" may not always paste the entire HTML content in design mode.
  + "Select All" does not select all the content in design mode.
* Known Browser Limitations:
  + Firefox
    - The remove alignment button is not compatible with Firefox.
    - "Select All" does not select the horizontal lines when the editor is used in Firefox.
    - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
    - The "Remove Alignment" feature may not work as expected in Firefox.
  + Internet Explorer
    - In Internet Explorer 8, the HTM file that is uploaded may show as distorted in design mode.
    - In Internet Explorer, when a user uploads a HTM file using the Template Manager while setting up an email, the uploaded HTM file may have a slightly different layout and formatting.
    - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
* CSS Limitations: Some features such as tables, CSS classes, and styles may not be displayed as expected in certain email programs. As a best practice, please avoid the use of the CSS options.
  + The CSS class is not applied for the Document Manager if they are nested CSS classes.
  + The following reference link provides details about which email clients support which type of CSS: [**http://www.campaignmonitor.com/css/**](http://www.campaignmonitor.com/css/). Users can view the email using a browser to show the entire contents of the email properly.
* Portal Security - If you have not requested to allow HTML tags, CSS, JavaScript, etc on your portal, you may see that some parts of the system no longer allow unsafe elements. You can opt out of this security measure by logging a case with Global Customer Support to enable bypass XSS validation. By bypassing this validation, Cornerstone will require you to agree to the security risk exposure this may cause. For more details on supported customizable elements: See Safe Listed Customizable Elements.

Note: A detailed demo of all features in the editor is available at <http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx>. Descriptions of each option in the toolbar are provided at <http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx>.

Email Digest Sections - Careers and Performance

Check-Ins - Email Digest Management

Creating an Email Digest allows an administrator to send a digest of check-in activities to specific users, OUs, or to all users in the organization. Administrators can also set up an email digest for Follow-Ups.

To create an email digest, go ADMIN > TOOLS > CORE FUNCTIONS > EMAIL DIGEST MANAGEMENT.

Creating an email digest is the same across all areas. See Email Digest - Create/Edit on page 7 for additional information.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - Manage | Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission. | Performance - Administration |

Email Digest for Check-Ins

To configure an Email Digest for Check-Ins, administrators need to add the following Sections:

* Missed Check-Ins - This email digest lists the discussions that the user had scheduled but a meeting was not created since the previous email digest. The digest looks at the Meeting Frequency for the scheduled discussions and accordingly informs users of their missed meetings. The recommended frequency for this section is weekly.
* Recent Check-Ins - This email digest lists the user’s recent discussions that have occurred since the previous email digest. For example, if the digest frequency is Weekly, this will include all the meetings scheduled in the last seven days. The recommended frequency for this section is weekly.
* Upcoming Check-Ins - This email digest lists the upcoming discussions for the user that are scheduled prior to the next email digest. The digest looks at the Meeting Frequency for the scheduled discussions and accordingly informs users of their upcoming recurring meetings. The recommended frequency for this section is daily. Note: If this section is included in a daily digest, it is recommended to deactivate the Check-In Created email trigger in Email Administration to avoid duplicate notifications.

Check-Ins Tags

The following tags are available for Check-Ins sections:

* {RECIPIENT.FIRST.NAME} - The email digest recipient’s first name.
* {RECIPIENT.LAST.NAME} - The email digest recipient’s last name.
* {LIST.BEGIN} - A tag that is used to begin a custom formatted activity list. Tags, text, and formatting that are between the {LIST.BEGIN} and {LIST.END} tags will be repeated to create an activity list.
* {LIST.END} - A tag that is used to end a custom formatted activity list. Tags, text, and formatting that are between the {LIST.BEGIN} and {LIST.END} tags will be repeated to create an activity list.
* {CHECK-IN.LINK} - A hyperlink that takes the user to the check-in page.
* {CHECK-IN.PARTICIPANT.FIRST.NAME} - The participant’s first name.
* {CHECK-IN.PARTICIPANT.LAST.NAME} - The participant’s last name.
* {CHECK-IN.MEETING.DATE} - The date on which the meeting is scheduled.
* {CHECK-IN.TITLE} - The name of the check-in.

Email Digest for Follow-Ups

To configure an Email Digest for Follow-Ups, administrators need to add the following Sections:

* Check-Ins Follow-Ups Assigned - This email digest alerts participants that a new Follow-Up action item is assigned. In addition to their individually assigned Follow-ups, the recipient will also receive notice of unassigned Follow-Ups.
* Check-Ins Follow-Ups Overdue - This email digest alerts participants that the due date for a Follow-Up has passed. Follow-Ups that were created more than three months ago will not be included in this digest.

Follow-Ups Tags

The following tags are available for Follow-Ups Sections:

* {CHECK-INS.FOLLOW-UP.CONTENT} - The content of the follow-up.
* {CHECK-INS.FOLLOW-UP.DUE.DATE} - The due date for the Follow-up. Will display "soon" when the Follow-Up has no due date.
* {CHECK-INS.FOLLOW-UP.LINK} - A hyperlink that takes the user to the Check-In meeting where that follow-up was created.
* {CHECK-INS.FOLLOW-UP.ASSIGNEE.FIRST.NAME} - The Follow-Up assignee's first name. Will display "Unassigned" when the Follow-Up has no assignee.
* {CHECK-INS.FOLLOW-UP.ASSIGNEE.LAST.NAME} - The Follow-Up assignee's last name.

Examples

Missed Check-Ins Body

Hi {RECIPIENT.FIRST.NAME},

It looks like you missed a few meetings this past week.

However, you can keep the check-in going. Add new meetings by selecting 'New Meeting' and begin preparing.

{LIST.BEGIN}

{CHECK-IN.PARTICIPANT.FIRST.NAME} {CHECK-IN.PARTICIPANT.LAST.NAME} on {CHECK-IN.MEETING.DATE} about {CHECK-IN.TITLE}.

Click here to view the discussions: {CHECK-IN.LINK}

{LIST.END}

Recent Check-Ins Body

Hi {RECIPIENT.FIRST.NAME},

Here are the recent check-ins that you had this past week.

Let’s keep the discussion going. Select ‘New Meeting' and begin preparing for your upcoming meetings.

{LIST.BEGIN}

{CHECK-IN.PARTICIPANT.FIRST.NAME} {CHECK-IN.PARTICIPANT.LAST.NAME} on {CHECK-IN.MEETING.DATE} about {CHECK-IN.TITLE}.

Click here to view the check-ins: {CHECK-INS.LINK}

{LIST.END}

Upcoming Check-Ins Body

Hi {RECIPIENT.FIRST.NAME},

Here are today's check-ins based on the date and frequency set in your <portalname>.

Don't see a meeting? Add one by selecting 'New Meeting' and begin preparing.

{LIST.BEGIN}

{CHECK-IN.PARTICIPANT.FIRST.NAME} {CHECK-INS.PARTICIPANT.LAST.NAME} on {CHECK-INS.MEETING.DATE} about {CHECK-INS.TITLE}.

Click here to view the check-ins: {CHECK-INS.LINK}

{LIST.END}

Check-Ins Email Digest FAQs

How do I send today’s discussions? There is no separate section for it.

You can use the “Upcoming Check-Ins” section to send today’s check-ins. For this, you must set the Frequency to Daily, and then the email will be sent if there are applicable discussions scheduled for that day. It is recommended to send this as a reminder in the early morning (6 AM) in the recipient’s time zone.

Email Digest - Compensation Task Due: Task Approver Section

This dynamic section is intended to alert recipients that there is one or more compensation task that requires their approval. This dynamic section can be configured to display the details of each compensation task that requires approval. If a user does not have any compensation tasks that require approval based on the section's reminder settings, then this section is not included in the email digest for the user.

This email digest section is only sent for valid compensation tasks. Also, if an approver is skipped in the approval process or if an approver becomes inactive, then the email digest is not sent to that approver.

This section is only available to organizations using compensation tasks.

Send Reminder

This setting enables administrators to determine the threshold at which a compensation task that is due will be included in this email digest section. For example, if the email digest is configured to be sent weekly and the Compensation Task Due: Task Approver section is configured to send a reminder two weeks before the task approval is due, then each week the system determines which compensation tasks have an approval due date that is two weeks from the email digest period. Note: If the reminder is set to "0 days before," then the email digest will be sent on the day the approval is due.

Because email digests can be sent at larger intervals (e.g., weekly or monthly), the email digest will likely not send the reminder exactly on the selected reminder date.

The reminder time units (i.e., days, weeks, or months) automatically match the frequency selection of the email digest (i.e., daily, weekly, or monthly). If the email digest is sent weekly, then the reminder setting is measured in weeks.

A Compensation Task Due: Task Approver section will only send one reminder for a compensation task. For example, if the reminder is set for 3 weeks, then the section will send a reminder when the due date is three weeks away. In order to configure multiple reminders for the same compensation task, multiple instances of the Compensation Task Due: Task Approver section should be added to the email digest with different reminder settings.

Section Send To Options

When configuring the Send To option for a Compensation Task Due: Task Approver section, the following relation options are available:

* Task Approver
* Task Approver Co-Planner

Section Specific Tags

When configuring the section body for a Compensation Task Due: Task Approver section, the following tags are available:

* {RECIPIENT.FIRST.NAME} - This displays the first name of the user who is receiving the email.
* {RECIPIENT.LAST.NAME} - This displays the last name of the user who is receiving the email.
* {LIST.BEGIN} - See the Repeater Tags section below.
* {LIST.END} - See the Repeater Tags section below.
* {APPROVAL.STATUS} - This displays the current approval status of the compensation plan (i.e., approved or denied).
* {TASK.ASSIGNEE.FIRST.NAME} - This displays the first name of the person who is assigned the task.
* {TASK.ASSIGNEE.LAST.NAME} - This displays the last name of the person who is assigned the task.
* {COMPENSATION.APPROVER.FIRST.NAME} - This displays the first name of the person who is responsible for approving the compensation task.
* {COMPENSATION.APPROVER.LAST.NAME} - This displays the last name of the person who is responsible for approving the compensation task.
* {TASK.END.DATE}
* {TASK.TITLE}

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Sample Section Text

The following is an example of how a Compensation Task Due: Task Approver section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

The following compensation tasks require your approval:

{LIST.BEGIN}

{TASK.TITLE} has an end date of {TASK.END.DATE}. This compensation plan is assigned to {TASK.ASSIGNEE.FIRST.NAME} {TASK.ASSIGNEE.LAST.NAME} and it currently has an approval status of {APPROVAL.STATUS}.

{LIST.END}

Email Digest - Goals Pending Approval Section

This email digest section is intended to alert recipients that they have goals that are pending their approval. This section can be configured to display the goals that require the recipient's approval. If a user does not have any goals that require their approval, then this section is not included in the email digest for the user.

This section is only available to organizations using goals.

To create an email digest, go ADMIN > TOOLS > CORE FUNCTIONS > EMAIL DIGEST MANAGEMENT, and then click the Create Email Digest button.

Section Send To Options

When configuring the Send To option for a Goals Pending Approval section, the following relation options are available:

* Goal Approver

Section Specific Tags

When configuring the section body for a Performance Review Step Assigned section, the following tags are available:

* RECIPIENT.FIRST.NAME - This displays the first name of the user who is receiving the email.
* RECIPIENT.LAST.NAME - This displays the last name of the user who is receiving the email.
* GOALS.APPROVAL.LINK - This displays a hyperlink that navigates the user to the Goals Approval page.
* LIST.BEGIN - See the Repeater Tags section below.
* LIST.END - See the Repeater Tags section below.
* GOAL.TITLE - This displays the title of the goal that requires approval.
* GOAL.OWNER.FIRST.NAME - This displays the first name of the user who owns the goal that requires approval.
* GOAL.OWNER.LAST.NAME - This displays the last name of the user who owns the goal that requires approval.

Repeater Tags

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Email Digest - Performance Review Step Assigned Section

This email digest section is intended to alert recipients that they have been assigned one or more performance review steps. This section can be configured to display the details of each new performance review step assignment, including reopened steps. If a user has not been assigned a performance review step since the last digest was delivered, then this section is not included in the email digest for the user.

This section is only available to organizations using performance reviews.

To create an email digest, go ADMIN > TOOLS > CORE FUNCTIONS > EMAIL DIGEST MANAGEMENT, and then click the Create Email Digest button.

Section Send To Options

When configuring the Send To option for a Performance Review Step Assigned section, the following relation options are available:

* Reviewer - If this option is selected and the reviewer is also the reviewee, then this section is not included in the reviewer's email digest.
* Reviewee - If this option is selected, then this section is only included in the reviewee's email digest if the reviewee is also the reviewer.
* Reviewee's Direct Manager
* Reviewee's Indirect Manager

Section Specific Tags

When configuring the section body for a Performance Review Step Assigned section, the following tags are available:

* RECIPIENT.FIRST.NAME - This displays the first name of the user who is receiving the email.
* RECIPIENT.LAST.NAME - This displays the last name of the user who is receiving the email.
* STEP.ASSIGNED.SUMMARY - This displays a formatted summary of each assigned performance review step. Each summary contains the Review Step Display Title, Review Link, and Review Due Date. The Summary tag can be used in place of a custom list because it provides a summary of each review step. The Summary tag should only be included once within a section, and Summary tags cannot be used inside a custom list. The Summary tags uses the following format:
  + <a href="{REVIEW.LINK}">{REVIEW.STEP.DISPLAY.TITLE}</a> | Due: {REVIEW.STEP.DUE.DATE}
* LIST.BEGIN - See the Repeater Tags section below.
* LIST.END - See the Repeater Tags section below.
* REVIEW.LINK - This displays a hyperlink that navigates the user to the Overview page of the performance review step.
* REVIEW.STEP.DUE.DATE - This displays the due date of the performance review step.
* REVIEW.STEP.TITLE - This displays the title of the performance review step.
* REVIEW.TASK.TITLE - This displays the title of the performance review task.
* REVIEWEE.FIRST.NAME - This displays the first name of the user who is being reviewed in the performance review step.
* REVIEWEE.LAST.NAME - This displays the last name of the user who is being reviewed in the performance review step.
* REVIEWER.FIRST.NAME - This displays the first name of the user who is required to complete the performance review step.
* REVIEWER.LAST.NAME - This displays the last name of the user who is required to complete the performance review step.
* REVIEW.STEP.DISPLAY.TITLE - This displays the title that appears for the step within Action Items.

Repeater Tags

Within a Performance Review Step Assigned section, the STEP.ASSIGNED.SUMMARY tag can be used to display a formatted summary of each assigned performance review step. However, if this tag is not used, administrators can use repeater tags to repeat information for each item in the email digest.

When using repeater tags with the reviewee tags, the entire reviewee list is included in the email digest if there is no REVIEW.LINK tag in the email body. Only one reviewee and the reviewee count are displayed if the REVIEW.LINK tag is included.

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Email Digest - Performance Review Step Due Section

This dynamic section is intended to alert recipients that there is one or more performance review steps that are due. This dynamic section can be configured to display the details of each new performance review step that is due. If a user does not have any performance review steps that are due based on the section's reminder settings, then this section is not included in the email digest for the user.

This section is only available to organizations using performance reviews.

Send Reminder

This setting enables administrators to determine the threshold at which a review step that is due will be included in this email digest section. For example, if the email digest is configured to be sent weekly and the Performance Review Step Due section is configured to send a reminder two weeks before the step is due, then each week the system determines which review steps have a due date that is two weeks from the email digest period. Note: If the reminder is set to "0 days before," then the email digest will be sent on the day the step is due.

Because email digests can be sent at larger intervals (e.g., weekly or monthly), the email digest will likely not send the reminder exactly on the selected reminder date.

The reminder time units (i.e., days, weeks, or months) automatically match the frequency selection of the email digest (i.e., daily, weekly, or monthly). If the email digest is sent weekly, then the reminder setting is measured in weeks.

A Performance Review Step Due section will only send one reminder for a performance review step. For example, if the reminder is set for 3 weeks, then the section will send a reminder when the due date is three weeks away. In order to configure multiple reminders for the same performance review step, multiple instances of the Performance Review Step Due section should be added to the email digest with different reminder settings.

Section Send To Options

When configuring the Send To option for a Performance Review Step Due section, the following relation options are available:

* Reviewer - If this option is selected and the reviewer is also the reviewee, then this section is not included in the reviewer's email digest.
* Reviewee - If this option is selected, then this section is only included in the reviewee's email digest if the reviewee is also the reviewer.
* Reviewee's Direct Manager
* Reviewee's Indirect Manager

Section Specific Tags

When configuring the section body for a Performance Review Step Due section, the following tags are available:

* {RECIPIENT.FIRST.NAME} - This displays the first name of the user who is receiving the email.
* {RECIPIENT.LAST.NAME} - This displays the last name of the user who is receiving the email.
* {STEP.DUE.SUMMARY} - This displays a formatted summary of each performance review step that is due. Each summary contains the Review Step Display Title, Review Link, and Review Due Date. The Summary tag can be used in place of a custom list because it provides a summary of each review step. The Summary tag should only be included once within a section, and Summary tags cannot be used inside a custom list. The Summary tags uses the following format:
  + <a href="{REVIEW.LINK}">{REVIEW.STEP.DISPLAY.TITLE}</a> | Due: {REVIEW.STEP.DUE.DATE}
* {LIST.BEGIN} - See the Repeater Tags section below.
* {LIST.END} - See the Repeater Tags section below.
* {REVIEW.LINK} - This displays a hyperlink that navigates the user to the Overview page of the performance review step.
* {REVIEW.STEP.DUE.DATE} - This displays the due date of the performance review step.
* {REVIEW.STEP.TITLE} - This displays the title of the performance review step.
* {REVIEW.TASK.TITLE} - This displays the title of the performance review task.
* {REVIEWEE.FIRST.NAME} - This displays the first name of the user who is being reviewed in the performance review step.
* {REVIEWEE.LAST.NAME} - This displays the last name of the user who is being reviewed in the performance review step.
* {REVIEWER.FIRST.NAME} - This displays the first name of the user who is required to complete the performance review step.
* {REVIEWER.LAST.NAME} - This displays the last name of the user who is required to complete the performance review step.
* {REVIEW.STEP.DISPLAY.TITLE} - This displays the title that appears for the step within Action Items.

Repeater Tags

Within a Performance Review Step Due section, the STEP.DUE.SUMMARY tag can be used to display a formatted summary of each performance review step that is due based on the section's reminder settings. However, if this tag is not used, administrators can use repeater tags to repeat information for each item in the email digest.

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Sample Section Text

The following is an example of how a Performance Review Step Due section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

You have the following performance review tasks coming due:

{STEP.DUE.SUMMARY}

Please log in and complete these review tasks at your earliest convenience.

Email Digest Sections - Core/General

Skill Rating and Feedback Sections

Creating an email digest allows an administrator to send a digest of skill ratings and feedback activities.

To create an email digest, go ADMIN > TOOLS > CORE FUNCTIONS > EMAIL DIGEST MANAGEMENT.

Creating an email digest is the same across all areas. See Email Digest - Create/Edit on page 7 for additional information.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - Manage | Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission. | Performance - Administration |

Email Digest for Skill Ratings and Feedback

To configure an email digest for skill ratings and feedback, administrators may use the following sections:

* Feedback Assignment Section
* Skill Endorsements Section
* Skill Feedback Section
* Skill Feedback Requests Section

Feedback Assignment Section

This email digest section is intended to alert or remind recipients that they have been assigned a feedback action item.

* When configured as a notification, if a user has not been assigned any feedback action items since the previous email digest was sent, then this section is not included in the email digest for the user.
* When configured as a reminder, if a user does not have any incomplete feedback action items, then this section is not included in the email digest for the user.

When configuring the Send To option for a Feedback Assignment section, the following relation options are available:

* Assigned Rater - This is the user who was assigned the feedback action item.

When configuring the section body for a Feedback Assignment section, the following tags are available:

* TargetUserCount - This displays the number of users that are being assessed included in the feedback request.
* PreviewTargetUsers - This displays the full names of the users being assessed in the feedback request. When the target user is the assigned rater, this displays "yourself."
* CapabilitiesCount - This displays the number of capabilities that are included in the feedback request.
* PreviewRatedCapabilities - This displays a preview of the capabilities on which the user is being rated. Up to three capabilities are displayed.
* RequestsLink - This includes the shareable link for the assigned rater to launch the feedback session.
* RequestName - This displays the name of the feedback request, as specified when the request was created.
* Requester - This displays the full name of the user who created the feedback request.

Example: Notification for Assigned Rater

{Requester} has requested that you provide feedback about {TargetUserCount} people including {PreviewTargetUsers}on the following {CapabilitiesCount} skills, {PreviewRatedCapabilities} — Give your Feedback {RequestsLink}.

Example: Reminders for Assigned Rater

{RequestorCount} requestors are waiting for your response give them your feedback. {RequestsLink}

{Requester} has requested that you provide feedback about {TargetUserCount} people including {PreviewTargetUsers}on the following {CapabilitiesCount} skills, {PreviewRatedCapabilities} — Give your Feedback {RequestsLink}.

Skill Endorsements Section

This email digest section is intended to alert recipients that they have received skill endorsements. If a user has not received any skill endorsements since the previous email digest was sent, then this section is not included in the email digest for the user. For example, if the digest frequency is Weekly, this will include all endorsements in the past seven days.

When configuring the Send To option for a Skill Endorsements section, the following relation options are available:

* Target User - This is the user who received the skill endorsement.
* Target User's Direct Manager - This is the direct manager of the user who received the skill endorsement.

When configuring the section body for a Skill Endorsements section, the following tags are available:

* CAPABILITY.NAME - This displays the type of capability for which the user received feedback. Currently, the only capability type is Skills.
* FEEDBACKTOTALCOUNT - This displays the number of skills on which the user received feedback in this digest.
* PREVIEWCAPABILITIES - This displays the names of the skills that received endorsements. A maximum of three skill names are displayed.
* PREVIEWRATERS - This displays the names of the people who gave endorsements.
* RATER.FIRSTNAME - This displays the first name of the user who gave the feedback.
* RATER.LASTNAME - This displays the last name of the user who gave the feedback.
* TARGETUSER.FIRSTNAME - This displays the first name of the user who received the feedback.
* TARGETUSER.LASTNAME - This displays the last name of the user who received the feedback.
* SKILLSPROFILE.LINK - This displays a link to the Skills Profile of the user who was endorsed.

Skill Feedback Section

This email digest section is intended to alert recipients that they have received skill feedback. If a user has not received any skill feedback since the previous email digest was sent, then this section is not included in the email digest for the user. For example, if the digest frequency is Weekly, this will include all skill feedback in the past seven days.

When configuring the Send To option for a Skill Feedback section, the following relation options are available:

* Target User - This is the user who received the skill feedback.
* Target User's Direct Manager - This is the direct manager of the user who received the skill feedback.

When configuring the section body for a Skill Feedback section, the following tags are available:

* CAPABILITYNAME - This displays the name of the skill for which the user received feedback.
* FEEDBACKTOTALCOUNT - This displays the number of skills on which the user received feedback in this digest.
* PREVIEW.CAPABILITIES - This displays the names of the skills that received feedback. A maximum of three skill names are displayed.
* RATER.FIRSTNAME - This displays the first name of the user who gave the feedback.
* RATER.LASTNAME - This displays the last name of the user who gave the feedback.
* SKILLSPROFILE.LINK - This displays a link to the Skills Profile of the user who received the feedback.
* TARGETUSER.FIRSTNAME - This displays the first name of the user who received the feedback.
* TARGETUSER.LASTNAME - This displays the last name of the user who received the feedback.

Skill Feedback Requests Section

This email digest section is intended to alert recipients that they have received responses to their skill feedback requests. If a user has not received responses to any skill feedback requests since the previous email digest was sent, then this section is not included in the email digest for the user. For example, if the digest frequency is Weekly, this will include all responses to skill feedback requests in the past seven days.

When configuring the Send To option for a Skill Feedback Requests section, the following relation options are available:

* Requester - This is the user who requested the skill feedback.

When configuring the section body for a Skill Feedback Requests section, the following tags are available:

* CAPABILITIESCOUNT - This displays the number of skills that received feedback in the request responses.
* PREVIEWRATEDCAPABILITIES - This displays the names of the skills that received feedback in the request responses. A maximum of three skill names are displayed.
* PREVIEWRATERS - This displays the names of the people who responded to the request. A maximum of three rater names are displayed.
* PREVIEWTARGETUSERS - This displays the names of the target users who received feedback responses within the request. For example, if a user requests and receives feedback for themselves, then the user who requested self feedback is the target user, and their name is displayed. A maximum of three target user names are displayed.
* RATERCOUNT - This displays the number of people who responded to the request in this digest.
* REQUESTNAME - This displays the name of the feedback request that received responses.
* TARGETUSERCOUNT - This displays the number of target users who received feedback responses within the request. For example, if a user requests and receives feedback for themselves, then the user who requested self feedback is the target user, and this tag will display "1" since there is only one target user in the request.
* VIEWRESPONSES - This displays a deep link to view the responses to the request.

Email Digest Sections - Learning

Email Digest - Community Postings Section

This dynamic section is intended to alert recipients that there is one or more new postings available in the recipient's Connect communities. This dynamic section can be configured to display the details of each new posting. If there has not been a new community posting that is available to the user since the last digest was delivered, then this section is not included in the email digest for the user.

This section is only available to organizations using New Connect.

Section Send To Options

When configuring the Send To option for a Community Postings section, the following relation options are available:

* Community Moderator
* Topic Moderator
* Community Members
* Followers

Section Specific Tags

When configuring the section body for a Community Postings section, the following tags are available:

* {RECIPIENT.FIRST.NAME} - This displays the first name of the user who is receiving the email.
* {RECIPIENT.LAST.NAME} - This displays the last name of the user who is receiving the email.
* {LIST.BEGIN} - See the Repeater Tags section below.
* {LIST.END} - See the Repeater Tags section below.
* {POSTING.CREATE.DATE} - This displays the date on which the posting was created.
* {COMMUNITY.POSTING.TITLE} - This displays the title of the posting.
* {COMMUNITY.POSTING.LINK} - This displays a hyperlink that navigates the user to the posting.
* {COMMUNITY.TOPIC.TITLE} - This displays the title of the topic in which the posting was created.
* {COMMUNITY.TITLE} - This displays the title of the community in which the posting was created.
* {POSTING.AUTHOR.FIRST.NAME} - This displays the first name of the user who created the posting.
* {POSTING.AUTHOR.LAST.NAME} - This displays the last name of the user who created the posting.

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Sample Section Text

The following is an example of how a Community Postings section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

{LIST.BEGIN}

{POSTING.AUTHOR.FIRST.NAME} {POSTING.AUTHOR.LAST.NAME} has created a new posting in "{COMMUNITY.TITLE}: {COMMUNITY.TOPIC.TITLE}" titled "{COMMUNITY.POSTING.TITLE}." Click here {COMMUNITY.POSTING.LINK} to view the posting!

{LIST.END}

Email Digest - Playlist Item Added Section

If a user is following at least one playlist which is updated with new content, when an email digest containing a Playlist Item Added section is deployed, the user receives an email with information about the updated playlist, as configured by an administrator. Administrators can create a Playlist Item Added section within an email digest and create an email body using playlist-specific tags, which helps provide users with relevant information about their followed playlists.

Notes:

* The Playlist Item Added email digest section notifies users when items are added to a playlist, but it does NOT notify users when items are removed from a playlist.
* The Playlist Item Added email digest only notifies followers if they are in the availability of the learning object added to the playlist.

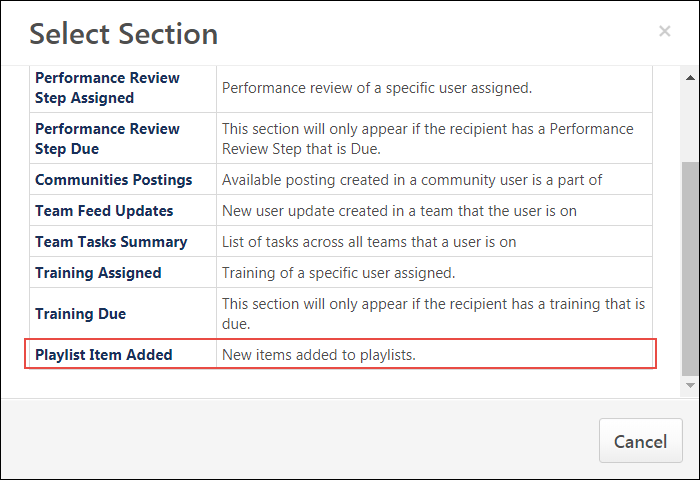
To create an email digest which can notify users of updates to their followed playlists, go to Admin > Tools > Core Functions > Email Digest Management. Click the Create Email Digest button to create a new email digest, or click the Edit option for an existing playlist to simply add a Playlist Item Added section to that playlist.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - Manage | Grants ability to create, edit, view, and delete email digests. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The permission constraints determine which email digests the administrator can edit and delete. This is an administrator permission. | Performance - Administration |

|  |  |  |
| --- | --- | --- |
| Email Digest Administration - View | Grants ability to view email digests. This permission cannot be constrained. This is an administrator permission. | Performance - Administration |



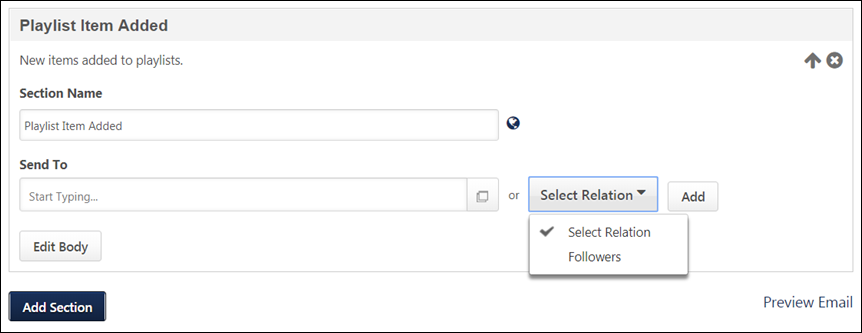
Add Section

To configure the Playlist Item Added section for an email digest:

1. Click the Add Section button at the bottom of the Create Email Digest page. This opens the Add Section pop-up window.
2. Click the name of the Playlist Item Added section type. The section will be added to the email digest, and you will need to provide more information.
3. Configure the following fields for the section:
   * Section Name - Enter the name of the email digest section, up to 100 characters. The name defaults to "Playlist Item Added."
   * Send To - Select to whom the email digest section should be sent. This field is required. You can either send the email digest section to specific users or to playlist followers, using the Select Relation drop-down menu. Click the Add button after selecting the appropriate user or relation:
     + To select a specific user, either enter the user's name in the field or click the Select icon  to select a user from the system. See Select User Pop-up for additional information.
     + To select a relation, select the appropriate relation from the drop-down menu. The type of section determines which relations are available.
   * Body - To edit the body of the email section, click the Edit Body button. This opens the Edit Section pop-up. The text included in the body of the email is what will be send to users specified in the Send To section when a new item is added to a playlist. You can use tags to provide relevant information about the playlists which have been updated to the email. See Email Digest - Edit Section Body on page 18 for additional information.
4. After you are finished configuring the email digest, click the Save button at the bottom of the page.

Note: Up to 250 items per user may display in the Playlist Item Added section of an email digest. Items are primarily sorted by date (most recent to least recent) and secondarily in alphabetical order according to playlist title.

For more information about creating an email digest: See Email Digest - Create/Edit on page 7 for additional information.



Playlist Item Added Tags

The following new tags are available when configuring the body of the Playlist Item Added section in an email digest:

| Tag Name | Tag Description |
| --- | --- |
| {LIST.BEGIN} | This tag is used to begin a custom formatted activity list. Tags, text, and formatting that are between the LIST.BEGIN and LIST.END tags will be repeated to create an activity list. |
| {LIST.END} | This tag is used to end a custom formatted activity list. Tags, text and formatting that are between the LIST.BEGIN and LIST.END tags will be repeated to create an activity list. |
| {RECIPIENT.FIRST.NAME} | This tag can be used to add the email recipient's first name to the email body. |
| {RECIPIENT.LAST.NAME} | This tag can be used to add the email recipient's last name to the email body. |
| {PLAYLIST.TITLE} | This tag is used to add the name of the updated playlist to the email body. |
| {PLAYLIST.DESCRIPTION} | This tag is used to add the description of the updated playlist to the email body. |
| {PLAYLIST.ITEM.ADD.DATE} | This tag adds the date the new training item was added to the updated playlist. |
| {PLAYLIST.ITEM.TITLE} | This tag adds the title of the new training item that was added to the updated playlist. |
| {PLAYLIST.ITEM.DESCRIPTION} | This tag adds the description of the new training item that was added to the updated playlist. |
| {PLAYLIST.ITEM.ANNOTATION} | This tag adds the annotation the playlist creator provided for the new training item that was added to the updated playlist. |
| {PLAYLIST.ITEM.TYPE} | This tag adds the training type of the new training item that was added to the updated playlist (i.e. online class, material, video, etc.). |
| {PLAYLIST.ITEM.LINK} | This tag adds a direct link to the Training Details page of the item that was added to the playlist. |
| {PLAYLIST.CREATOR.FIRST.NAME} | This tag adds the first name of the creator of the updated playlist to the body of the email. |
| {PLAYLIST.CREATOR.LAST.NAME} | This tag adds the last name of the creator of the updated playlist to the body of the email. |
| {PLAYLIST.LINK} | This tag adds a direct link to the Playlist Details page of the updated playlist. |

Email Digest - Team Feed Updates Section

This dynamic section is intended to alert recipients that there is one or more new user updates available in the recipient's Connect team feeds. This dynamic section can be configured to display the details of each new team feed update. If there has not been a new team feed update that is available to the user since the last digest was delivered, then this section is not included in the email digest for the user.

This section is only available to organizations using New Connect.

Section Send To Options

When configuring the Send To option for a Team Feed Updates section, the following relation options are available:

* Team Members
* Team Leads

Section Specific Tags

When configuring the section body for a Team Feed Updates section, the following tags are available:

* {RECIPIENT.FIRST.NAME} - This displays the first name of the user who is receiving the email.
* {RECIPIENT.LAST.NAME} - This displays the last name of the user who is receiving the email.
* {LIST.BEGIN} - See the Repeater Tags section below.
* {LIST.END} - See the Repeater Tags section below.
* {UPDATE.CREATE.DATE} - This displays the date on which the update was created.
* {CONNECT.TEAM.TITLE} - This displays the title of the team in which the update was created.
* {CONNECT.TEAM.LINK} - This displays a hyperlink that navigates the user to the corresponding team.
* {CONNECT.USER.UPDATE} - This displays the text of the user update.
* {UPDATE.AUTHOR.FIRST.NAME} - This displays the first name of the user who created the update.
* {UPDATE.AUTHOR.LAST.NAME} - This displays the last name of the user who created the update.

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Sample Section Text

The following is an example of how a Team Feed Updates section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

{LIST.BEGIN}

{UPDATE.AUTHOR.FIRST.NAME} {UPDATE.AUTHOR.LAST.NAME} has posted to your Connect team.

Team: {CONNECT.TEAM.TITLE}

Update: {CONNECT.USER.UPDATE}

Team Link: {CONNECT.TEAM.LINK}

{LIST.END}

Email Digest - Team Tasks Summary Section

This dynamic section is intended to alert recipients that there is one or more active team tasks available in the recipient's Connect teams. This dynamic section can be configured to display the details of each active team task. If there is not an active team task that is available to the user, then this section is not included in the email digest for the user.

This section is only available to organizations using New Connect.

Section Send To Options

When configuring the Send To option for a Team Tasks Summary section, the following relation options are available:

* Team Members
* Team Leads
* Task Assignees

Section Specific Tags

When configuring the section body for a Team Tasks Summary section, the following tags are available:

* {RECIPIENT.FIRST.NAME} - This displays the first name of the user who is receiving the email.
* {RECIPIENT.LAST.NAME} - This displays the last name of the user who is receiving the email.
* {LIST.BEGIN} - See the Repeater Tags section below.
* {LIST.END} - See the Repeater Tags section below.
* {TASK.CREATE.DATE} - This displays the date on which the task was created.
* {CONNECT.TASK.TITLE} - This displays the title of the task.
* {CONNECT.TEAM.TITLE} - This displays the title of the team in which the task was created.
* {CONNECT.TASK.LINK} - This displays a hyperlink that navigates the user to the task.
* {CONNECT.TEAM.LINK} - This displays a hyperlink that navigates the user to the corresponding team.
* {CONNECT.TASK.DUE.DATE} - This displays the date on which the task is due. If the task does not have a due date, then "--" is displayed.
* {TASK.ASSIGNEE.FIRST.NAME} - This displays the first name of the user who is assigned the task. If the task does not have an assignee, then "--" is displayed.
* {TASK.ASSIGNEE.LAST.NAME} - This displays the last name of the user who is assigned the task. If the task does not have an assignee, then "--" is displayed.

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Sample Section Text

The following is an example of how a Team Tasks Summary section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

The following tasks have been assigned to your teams:

{LIST.BEGIN}

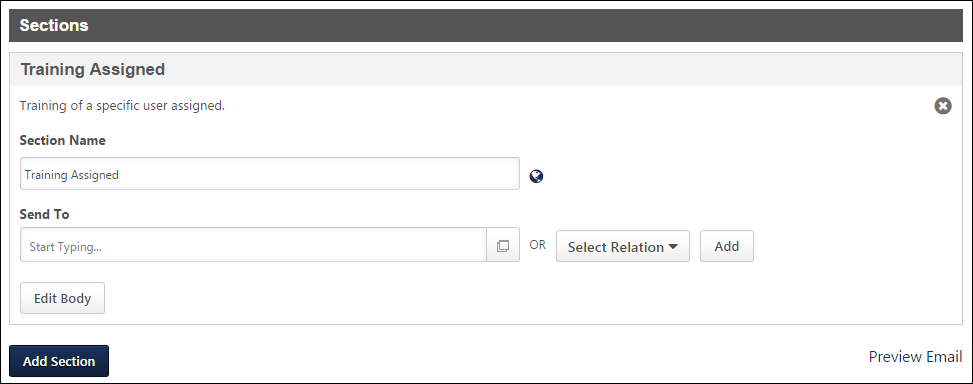
{CONNECT.TASK.TITLE} is created for the {CONNECT.TEAM.TITLE} team. This task is assigned to {TASK.ASSIGNEE.FIRST.NAME} {TASK.ASSIGNEE.LAST.NAME} and is due on {CONNECT.TASK.DUE.DATE}. Click here {CONNECT.TASK.LINK} to view the task. Click here {CONNECT.TEAM.LINK} to view the team.

{LIST.END}

Email Digest - Training Assigned Section

The Training Assigned section is a dynamic section intended to alert managers and learners that a new learning object (LO) has been assigned to the learner. Instead of receiving separate emails for each individual training assignment, a Training Assigned email digest section can be configured to consolidate all Training Assigned email notifications into a single email digest, based on a specified frequency.

Note: There is a limit of 50 items per user which can be included in the Training Assigned section of the email digest. If a user has been assigned more than 50 learning objects (LOs), these excess LOs will not be included in the email digest. In cases like this, the TRANSCRIPT.LINK tag can be added to the email digest to allow the recipient to easily navigate to their learning transcript and view all of their assigned training. For managers who have a large number of direct reports with a large amount of assigned training that would no longer be captured entirely by an email digest, reporting functionality can be used to view users' assigned training.



Section Send To Options

When configuring the Send To option for a Training Assigned section, the following relation options are available:

* Trainee
* Trainee's Manager

Section Specific Tags

When configuring the section body for a Training Assigned section, the following tags are available:

* {DUE.DATE} - This displays the assigned training's due date.
* {DURATION} - This displays the number of training hours for the assigned training.
* {LAUNCH.TRAINING} - This displays a link to launch the assigned training.
* {LIST.BEGIN} - See the Repeater Tags section below.
* {LIST.END} - See the Repeater Tags section below.
* {MANAGER.FIRST.NAME} - This displays the first name of the trainee's manager.
* {MANAGER.LAST.NAME} - This displays the last name of the trainee's manager.
* {RECIPIENT.FIRST.NAME} - This displays the first name of the user who is receiving the email.
* {RECIPIENT.LAST.NAME} - This displays the last name of the user who is receiving the email.
* {TITLE} - This displays the name of the assigned training.
* {TRAINEE.FIRST.NAME} - This displays the first name of the user who is assigned the training.
* {TRAINEE.LAST.NAME} - This displays the last name of the user who is assigned the training.
* {TRAINING.DESCRIPTION} - This displays the assigned training's description.
* {TRAINING.STATUS} - This displays the current status of the assigned training on the trainee's transcript.
* {TRAINING.TYPE} - This displays the LO type of the assigned training.
* {TRANSCRIPT.LINK} - This displays the transcript page URL.

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Sample Section Text

The following is an example of how a Training Assigned section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

{LIST.BEGIN}

The training, {TITLE}, has been assigned to your transcript in a(n) {TRAINING.STATUS} status.

Description: {DESCRIPTION}

Due Date: {DUE.DATE}

Training Hours: {DURATION}

{LIST.END}

Considerations

Users will only receive a Training Assigned email digest section if all of the following are true:

* Training has been assigned to user within the timeframe set by digest frequency
* The assigned learning object (LO) is active
* The LO is on the user's transcript (includes the archived transcript)
* The user who was assigned training is active in the system

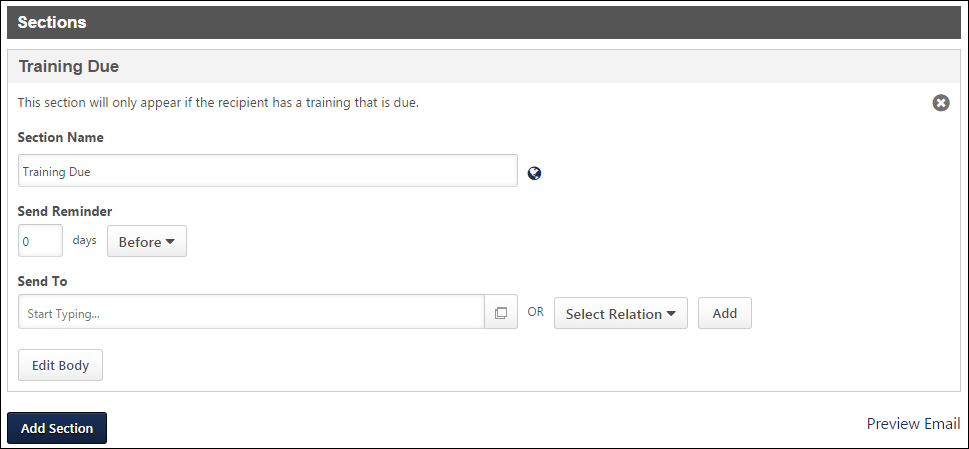
Email digests respect the No Emails setting when configured either at the LO level or from within a learning assignment. Either the Custom Emails option or the Training Specific Emails option must be selected. If the Training Assigned email digest section is enabled, the Training Assigned email trigger must be inactive to prevent the training emails from firing. Otherwise, the user will receive both an email digest AND an individual email.

The Training Assigned email digest does not verify the status of the training before sending the email digest. If training has already been completed but it was assigned within the digest window, the user will still receive an email notifying them that they have training assigned.

Email Digest - Training Due Section

The Training Due section is a dynamic section intended to alert managers and learners that the due date for a learning object (LO) assigned to the trainee is approaching. Instead of receiving separate emails for each individual training assignment, a Training Due email digest section can be configured to consolidate all Training Due email notifications into a single email digest, based on a specified frequency.

Note: There is a limit of 50 items per user which can be included in the Training Assigned section of the email digest. If a user has been assigned more than 50 learning objects (LOs), these excess LOs will not be included in the email digest. In cases like this, the TRANSCRIPT.LINK tag can be added to the email digest to allow the recipient to easily navigate to their learning transcript and view all of their assigned training. For managers who have a large number of direct reports with a large amount of assigned training that would no longer be captured entirely by an email digest, reporting functionality can be used to view users' assigned training.



Section Send To Options

When configuring the Send To option for a Training Due section, the following relation options are available:

* Trainee
* Trainee's Manager

Send Reminder

This setting enables administrators to determine the threshold at which a training item that is due will be included in this email digest section. For example, if the email digest is configured to be sent weekly, and the Training Due email digest section is configured to send a reminder 7 days before the training is due, then each week the system determines which training items have a due date that is 7 days from the email digest period. Note: If the reminder is set to "0 days before," then the email digest will be sent on the day the approval is due.

Because email digests can be sent at larger intervals (e.g., weekly or monthly), the email digest will likely not send the reminder exactly on the selected reminder date.

The reminder time units (i.e., days, weeks, or months) automatically match the frequency selection of the email digest (i.e., daily, weekly, or monthly). If the email digest is sent weekly, then the reminder setting is measured in weeks.

Training Due: The Training Due section will only send one due date reminder for an LO. For example, if the reminder is set for 7 days before the LO's due date, then the section will send a reminder when the due date is 7 days away. In order to configure multiple reminders for the same training item, multiple instances of the Training Due section should be added to the email digest with different reminder settings.

Section Specific Tags

When configuring the section body for a Training Due section, the following tags are available:

* {DUE.DATE} - This displays the assigned training's due date.
* {DURATION} - This displays the number of training hours for the assigned training.
* {LAUNCH.TRAINING} - This displays a link to launch the assigned training.
* {LIST.BEGIN} - See the Repeater Tags section below.
* {LIST.END} - See the Repeater Tags section below.
* {MANAGER.FIRST.NAME} - This displays the first name of the trainee's manager.
* {MANAGER.LAST.NAME} - This displays the last name of the trainee's manager.
* {RECIPIENT.FIRST.NAME} - This displays the first name of the user who is receiving the email.
* {RECIPIENT.LAST.NAME} - This displays the last name of the user who is receiving the email.
* {TITLE} - This displays the name of the assigned training.
* {TRAINEE.FIRST.NAME} - This displays the first name of the user who is assigned the training.
* {TRAINEE.LAST.NAME} - This displays the last name of the user who is assigned the training.
* {TRAINING.DESCRIPTION} - This displays the assigned training's description.
* {TRAINING.STATUS} - This displays the current status of the assigned training on the trainee's transcript.
* {TRAINING.TYPE} - This displays the LO type of the assigned training.
* {TRANSCRIPT.LINK} - This displays the transcript page URL.

Repeater Tags

Administrators can use repeater tags to repeat information for each item in the email digest.

Because non-standard sections are designed to display a digest of information in a single section, repeater tags must be placed before and after all of the content that should be repeated for each item in the digest. For a section that displays all of the items assigned to a user, then the repeater tags should be placed before and after the content and tags that describe each individual assigned item, such as title and due date.

The following repeater tags should be placed before and after the content that should be repeated:

* {LIST.BEGIN} - This tag should be placed at the beginning of the content that should be repeated for each item.
* {LIST.END} - This tag should be placed at the end of the content that should be repeated for each item.

Sample Section Text

The following is an example of how a Training Due section may be configured:

Hello {RECIPIENT.FIRST.NAME} {RECIPIENT.LAST.NAME},

{LIST.BEGIN}

The due date for the training, {TITLE}, is quickly approaching. Please complete this training item by {DUE.DATE}.

To launch this training from this email, please click {LAUNCH.TRAINING}.

{LIST.END}

Considerations

Users will only receive a Training Due email digest section when all of the following are true:

* The email digest is set to fire at a time that aligns with the reminder configurations set in the Training Due section.
* The assigned learning object (LO) is active
* The LO is on the user's transcript (includes the archived transcript)
* The user who was assigned training is active in the system

Email digests respect the No Emails setting when configured either at the LO level or from within a learning assignment. Either the Custom Emails option or the Training Specific Emails option must be selected. If the Training is Due email digest section is enabled, the Training is Due email trigger must be inactive to prevent the training emails from firing. Otherwise, the user will receive both an email digest AND an individual email.

Marketing Communications Overview

Marketing Communications Administration

Marketing Communication allows administrators to create and send marketing emails using some of the same features in Email Administration. Templates can be created and re-used to send marketing emails at specific dates and times.

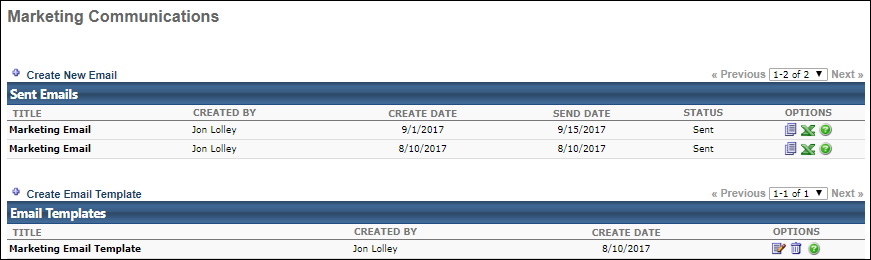
To manage marketing emails and templates, go to Admin > Tools > Core Functions > Marketing Communications.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Marketing Email Templates - Manage | Grants ability to create and save Marketing Email Templates, which can be reused to send future marketing email messages to users. This is an administrator permission. | Core Administration |

|  |  |  |
| --- | --- | --- |
| Marketing Emails - Manage | Grants ability to create and send ad hoc emails to populations of users based on their assigned org units, groups, or by user name. This is an administrator permission. | Core Administration |



Create Marketing Email

To create a new marketing email, select the Create New Email link. See Marketing Email - Create on page 58 for additional information.

Marketing Emails

All existing marketing emails appear in the Marketing Emails table. The following options may be available:

1. Copy  - Select this icon to copy an existing email. See Marketing Email - Create on page 58 for additional information.
2. Export Log - Select this icon to export the email activity log. The Email log is a basic excel report showing to whom the Email was sent for the last 30 days.
3. Edit - Select this icon to edit an existing email. This option is not available once the email is sent.
4. Delete  - Select this icon to remove the existing email. Emails cannot be deleted if they are currently being processed or have already processed.
5. Modification History  - Select this icon to view the modification history of the marketing email or template.
   * For each modification, the modification history displays the name of the administrator who modified the email and the date and time at which the email was modified.

Create Marketing Email Template

To create a new marketing email template, select the Create Email Template link. See Marketing Email Template - Create on page 66 for additional information.

Marketing Email Templates

All existing marketing email templates appear in the Email Templates table. The following options may be available:

1. Edit - Select this icon to edit an existing email template.
2. Delete  - to remove existing email template.
3. Modification History  - Select this icon to view the modification history of the marketing email or template.
   * For each modification, the modification history displays the name of the administrator who modified the email and the date and time at which the email was modified.

Marketing Email - Create

Marketing emails can be created from the Marketing Communications page. An organization might create a marketing email to promote an internal product, announce new online training, or inform employees of an upcoming mandatory security course. There are many ways organizations can use marketing emails to provide employees with important information.

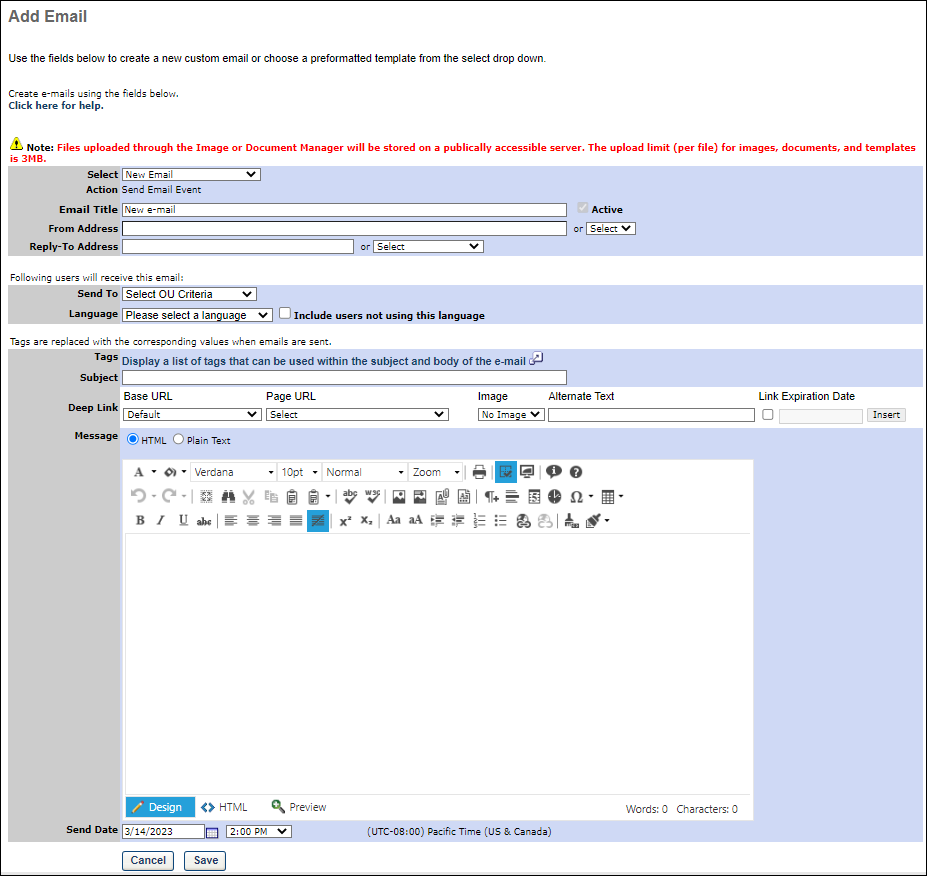
To create a marketing email, go to Admin > Tools > Core Functions > Marketing Communications. Then, click the Create New Email link.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email - Edit From Address | Grants ability to edit the "from" address when creating or modifying an email trigger. In addition, the Allow user to change email address option must be selected in Email Preferences. This permission works in conjunction with the Global Email Administration - Manage permission. This is an administrator permission. | Core Administration |

|  |  |  |
| --- | --- | --- |
| Marketing Emails - Manage | Grants ability to create and send ad hoc emails to populations of users based on their assigned org units, groups, or by user name. This is an administrator permission. | Core Administration |



Title and Address

Complete the following information in the Title and Address section:

| Field Name | Description |
| --- | --- |
| Select [Template] | This field displays if at least one marketing communication email template is defined from the Marketing Communications page. Select a template from the drop-down. The email populates with the values defined for the template. The template values can be changed when configuring the email. |
| Email Title | Enter a title for the email. |
| Active | Check the Active box to activate the email. If checked, the email becomes live upon clicking Save. |
| From Address | Enter the from address, or select one of the default addresses in the drop-down menu. Note: You must have the appropriate permission to edit this field. In addition, the Allow user to change email address setting must be enabled in Email Preferences.   * Default addresses can be configured for the From Address field through Corporate Preferences. Administrators can only select default email addresses that are active in Corporate Preferences. See Corporate Preferences. * Email addresses must be entered in a valid email address format. |
| Reply-To-Address | Enter the address to which recipients can reply to the email, or select one of the default addresses in the drop-down menu.   * Default addresses can be configured for the Reply-To Address field through Corporate Preferences. Administrators can only select default email addresses that are active in Corporate Preferences. See Corporate Preferences. * Email addresses must be entered in a valid email address format. |
| Type | By default, marketing emails are Promotional emails. The Type field is read-only and not editable. |

Recipient and Language

Complete the following information in the Recipient and Language section:

| Field Name | Description |
| --- | --- |
| Send To | Select either a specific user to receive the email or select a specific organizational unit from the drop-down.  If multiple organizational units are selected, then the email is sent to all users within any of the selected organizational units. |
| Language | Select a language from drop-down. Emails only fire to recipients who are defined in the Send To field if the template matches the user's language preference when the action is performed.   * Only one language may be associated to each email template. * When an email is triggered, the system must check the language of the recipient. * The email is only sent to users who are using the language specified for the email. * The email tags always appear in English. However, if the administrator clicks the Display a list of tags link, then the descriptions of the tags appear in the language of the administrator who is viewing the tags.   Include users not using this language - This option is unselected by default. This option is only available when multiple languages are enabled for the portal.   * When this option is selected, the system does not validate the recipient's display language before sending the email. This enables administrators to create a single email trigger that will be sent to recipients regardless of their configured language. For example, an email that is created in English (UK) will be sent to recipients of any language configured for the portal (e.g., English (US), Japanese, Polish, Thai) that meet the selected availability criteria. Important: The subject and message of the email are not translated to the recipient's language. If multiple emails are configured for the same trigger such as one in English (UK) and one in Polish, and one trigger has this option selected, it is possible for some users to receive multiple emails for the same action. This duplication can be prevented by adjusting the availability of the email with this language override option selected. * When this option is not selected, the recipient only receives the email if they meet the availability criteria for the email trigger and if the recipient's display language matches the language configured for the email trigger. If no users in the availability have a display language that matches the language set for the email, then the email status remains in a Queued status to allow the email creator to edit the email. * When editing an existing email and changing this option setting, all future emails including those that are currently queued will respect the updated setting. |

Message

Complete the following information in the Message section:

| Field Name | Description |
| --- | --- |
| Tags | Click the Display a list of tags link to view tags available to use in the Subject or Message fields. When the email is sent, the tags are replaced with actual information. The tags must be entered exactly as they are listed, and they are case sensitive. For example, to dynamically address the email to recipients, enter "Dear RECIPIENT.NAME" at the top of the Message field. The field would be replaced with the relevant information. |
| Subject | Enter a subject for the email message. The subject displays to the recipient when they receive the email. Tags can be used in this field. |
| Deep Link | The Deep Link section allows administrators to add deep links to marketing emails . The following options are available:   * Base URL - This is a required field. Select the base URL from the drop-down. The following options are available:   + Default - This option is selected by default. When selected, users must log into the system upon clicking the link in the email.   + SSO URL - This option only displays if at least one base URL is configured on the [**Deep Link**](file:///C:/cornerstone-csx-online-help/Content/Deep%20Linking/Base%20URL%20Tab.htm) page. When selected, users are not asked to log in to the system upon clicking the link in the email.   + Self-Registration URL - This option only applies to anonymous self-registration URLs. * Page URL - This is a required field. Select the page URL from the Page URL drop-down. This drop-down displays all existing page URLs from the Page URL tab. Once the page URL is selected, additional options may be available to configure. For example, if the Launch Training page URL is selected, an option displays to select the learning object to which the deep link will take the user. Note: When configuring the email, if the Send To field is set to a self-registration group, then the Register User and Launch Training Page URL type does not appear as an option in the deep link drop-down. * Image - This field is optional. This field allows administrators to add images that can be used in the email or email template. By default, "No Image" is selected in the Image drop-down. To add an image, select Add New from the drop-down, and then upload an image. Once an image is uploaded and the links are generated, the image cannot be deleted. The images are stored in the WYSIWYG image manager for emails. See the WYSIWYG Tool Considerations below for important considerations when using the WYSIWYG tool. * Alternate Text - This field is optional. Enter the text that will display in place of the link and/or when the link is hovered over. When the alternate text is inserted into an email, the text displays at the top of the message body in the Message box. The text can be moved anywhere in the message. When users view the email, the alternate text displays as a link. Alternate Text Example:[[1]](#footnote-1)   Note: If an image and alternate text are included, then the image is what displays in the email, and the alternate text displays when users hover over the image. If the image does not render properly in the email, then the alternate text does not display.   * Link Expiration Date - This field is optional. Check the box to make the link finite. When checked, the numeric text box is enabled to the right of the checkbox. Enter a date in the text box or use the calendar option to select a date. The date must be in the future. The link expires at 11:59 p.m. in the user's time zone on the date defined. Note: This is not the time zone of the administrator generating the links. This is the time zone of the user who accesses the link.   Once all required fields are completed, click Insert to add the deep link to the email. There may be several minutes of processing time to add the link once the Insert button is clicked. By default, the link displays at the top of the message body but can be moved anywhere in the email.  Considerations   * Anonymous deep linking is supported where users are routed to their applicable end point. Availability is still defined by the anonymous user group. If a user is routed to a page to which they do not have access, then an alternate page displays in place of the link. * If a deep link is generated with a base URL for which the recipients of the email do not meet the availability criteria, then the base URL reverts to the default URL for those recipients only. * When a user receives an email containing a deep link for an outdated version of a curriculum, clicking that deep link redirects the user to the Training Details page of that training. Then, at the top of the page, the user sees a notification message stating that the training is out of date, and the user can click a link to access the latest version. This behavior is applicable to curricula only. |
| Message | Enter the message for recipient. The following options are available for configuring the message:   * Tags - Tags may be used in this field. To view a list of available tags, click the Display a list of tags link. * WYSIWYG Tool - The WYSIWYG (What You See Is What You Get) tool provides configuration tools, such as images, fonts, colors, formatting, and tables. There is also a Copy from Word feature that enables administrators to import from Microsoft Word, preserving the formatting used in the Word document. HTML code can also be used. The system only accepts certain customizable HTML elements in the WYSIWYG Editor. Elements that are not acceptable display as text. See Safe Listed Customizable Elements.   The top toolbar of the WYSIWYG tool contains configuration options. The bottom toolbar is used to switch from design to HTML mode, as well as preview the email.  See the WYSIWYG Tool Considerations below for important considerations when using the WYSIWYG tool.  When configuring emails, a message appears in red at the top of the page, alerting you that files uploaded through the Image or Document Manager are stored on a publicly accessible server. The maximum file size is 3MB. |
| Send Date | In the date and time drop-downs, select the date and time at which the email will be sent. |

Save/Cancel

Once all fields have been completed, click Save. Or, click Cancel to cancel creating the email.

Expired/Deleted Links

When a user clicks a link that no longer exists because the link has expired or the link has been deleted from the [**Deep Link**](file:///C:/cornerstone-csx-online-help/Content/Deep%20Linking/Deep%20Link%20Management.htm) page, the user is navigated to the portal's Welcome page, which displays a link expiration message. The expiration message is hardcoded and displays "The page you are looking for is no longer available."

Active Status

Marketing emails are active by default. The active status cannot be modified.

Troubleshooting

For email troubleshooting, see the [**Email Troubleshooting Guide**](file:///C:/cornerstone-csx-online-help/Content/OnDemand%20Support/Troubleshooting%20Guides/Email%20TSG.htm) in the OnDemand Support folder.

WYSIWYG Tool Considerations

The following are important considerations when using the WYSIWYG tool:

* The Telerik editor demo website ([**http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx**](http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx)) is provided for reference purposes only. The editor available in Email Administration is a different version than the demo editor on the website, and there may be features that work differently or are missing. Hence, all features of the editor may not function in the same way as demonstrated in the demo editor.
* Editor Limitations:
  + Microsoft Outlook does not display media files embedded in the editor.
  + The paste feature may not paste some HTML content when done in the Design mode, for example "iframes." This can be done via HTML mode instead.
  + Some media file codes are taken in by the editor but may not display in the emails received by the user.
  + HTM files successfully uploaded via the Document Manager in the editor may not be displayed accurately in Outlook.
  + Preview may not be identical to how a specific email client renders the email.
  + "Paste" may not always paste the entire HTML content in design mode.
  + "Select All" does not select all the content in design mode.
* Known Browser Limitations:
  + Firefox
    - The remove alignment button is not compatible with Firefox.
    - "Select All" does not select the horizontal lines when the editor is used in Firefox.
    - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
    - The "Remove Alignment" feature may not work as expected in Firefox.
  + Internet Explorer
    - In Internet Explorer 8, the HTM file that is uploaded may show as distorted in design mode.
    - In Internet Explorer, when a user uploads a HTM file using the Template Manager while setting up an email, the uploaded HTM file may have a slightly different layout and formatting.
    - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
* CSS Limitations: Some features such as tables, CSS classes, and styles may not be displayed as expected in certain email programs. As a best practice, please avoid the use of the CSS options.
  + The CSS class is not applied for the Document Manager if they are nested CSS classes.
  + The following reference link provides details about which email clients support which type of CSS: [**http://www.campaignmonitor.com/css/**](http://www.campaignmonitor.com/css/). Users can view the email using a browser to show the entire contents of the email properly.
* Portal Security - If you have not requested to allow HTML tags, CSS, JavaScript, etc on your portal, you may see that some parts of the system no longer allow unsafe elements. You can opt out of this security measure by logging a case with Global Customer Support to enable bypass XSS validation. By bypassing this validation, Cornerstone will require you to agree to the security risk exposure this may cause. For more details on supported customizable elements: See Safe Listed Customizable Elements.

Note: A detailed demo of all features in the editor is available at <http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx>. Descriptions of each option in the toolbar are provided at <http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx>.

Marketing Email Template - Create

To create a marketing email template, go to Admin > Tools > Core Functions > Marketing Communications. Then, click the Create Email Template link.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Marketing Email Templates - Manage | Grants ability to create and save Marketing Email Templates, which can be reused to send future marketing email messages to users. This is an administrator permission. | Core Administration |

Title and Address

Complete the following information in the Title and Address section:

| Field Name | Description |
| --- | --- |
| Email Title | Enter a title for the email. |
| From Address | Enter the from address. Note: You must have the appropriate permission to edit this field. In addition, the Allow user to change email address setting must be enabled in Email Preferences.   * A default address can be configured for the From Address field through Corporate Preferences which pre-populates all new emails with the same From address. Administrators can only select default email addresses that are active in Corporate Preferences. * Email addresses must be entered in a valid email address format. |
| Reply-To-Address | Enter the address to which recipients can reply to the email.   * A default address can be configured for the Reply-To Address field through Corporate Preferences which pre-populates all new emails with the same Reply-To address. Administrators can only select default email addresses that are active in Corporate Preferences. * Email addresses must be entered in a valid email address format. |

Recipient and Language

Complete the following information in the Recipient and Language section:

| Field Name | Description |
| --- | --- |
| Template Availability | Choose to restrict the availability of the email template to a specific OU. |
| Language | Select a language from drop-down. Emails only fire to recipients who are defined in the Send To field if the template matches the user's language preference when the action is performed.   * Only one language may be associated to each email template. * When an email is triggered, the system must check the language of the recipient. * The email is only sent to users who are using the language specified for the email. * The email tags always appear in English. However, if the administrator clicks the Display a list of tags link, then the descriptions of the tags appear in the language of the administrator who is viewing the tags.   Include users not using this language - This option is unselected by default. This option is only available when multiple languages are enabled for the portal.   * When this option is selected, the system does not validate the recipient's display language before sending the email. This enables administrators to create a single email trigger that will be sent to recipients regardless of their configured language. For example, an email that is created in English (UK) will be sent to recipients of any language configured for the portal (e.g., English (US), Japanese, Polish, Thai) that meet the selected availability criteria. Important: The subject and message of the email are not translated to the recipient's language. If multiple emails are configured for the same trigger such as one in English (UK) and one in Polish, and one trigger has this option selected, it is possible for some users to receive multiple emails for the same action. This duplication can be prevented by adjusting the availability of the email with this language override option selected. * When this option is not selected, the recipient only receives the email if they meet the availability criteria for the email trigger and if the recipient's display language matches the language configured for the email trigger. If no users in the availability have a display language that matches the language set for the email, then the email status remains in a Queued status to allow the email creator to edit the email. * When editing an existing email and changing this option setting, all future emails including those that are currently queued will respect the updated setting. |

Message

Complete the following information in the Message section:

| Field Name | Description |
| --- | --- |
| Tags | Click the Display a list of tags link to view tags available to use in the Subject or Message fields. When the email is sent, the tags are replaced with actual information. The tags must be entered exactly as they are listed, and they are case sensitive. For example, to dynamically address the email to recipients, enter "Dear RECIPIENT.NAME" at the top of the Message field. The field would be replaced with the relevant information. |
| Subject | Enter a subject for the email message. The subject displays to the recipient when they receive the email. Tags can be used in this field. |
| Deep Link | The Deep Link section allows administrators to add deep links to marketing emails . The following options are available:   * Base URL - This is a required field. Select the base URL from the drop-down. The following options are available:   + Default - This option is selected by default. When selected, users must log into the system upon clicking the link in the email.   + SSO URL - This option only displays if at least one base URL is configured on the [**Deep Link**](file:///C:/cornerstone-csx-online-help/Content/Deep%20Linking/Base%20URL%20Tab.htm) page. When selected, users are not asked to log in to the system upon clicking the link in the email.   + Self-Registration URL - This option only applies to anonymous self-registration URLs. * Page URL - This is a required field. Select the page URL from the Page URL drop-down. This drop-down displays all existing page URLs from the Page URL tab. Once the page URL is selected, additional options may be available to configure. For example, if the Launch Training page URL is selected, an option displays to select the learning object to which the deep link will take the user. Note: When configuring the email, if the Send To field is set to a self-registration group, then the Register User and Launch Training Page URL type does not appear as an option in the deep link drop-down. * Image - This field is optional. This field allows administrators to add images that can be used in the email or email template. By default, "No Image" is selected in the Image drop-down. To add an image, select Add New from the drop-down, and then upload an image. Once an image is uploaded and the links are generated, the image cannot be deleted. The images are stored in the WYSIWYG image manager for emails. See the WYSIWYG Tool Considerations below for important considerations when using the WYSIWYG tool. * Alternate Text - This field is optional. Enter the text that will display in place of the link and/or when the link is hovered over. When the alternate text is inserted into an email, the text displays at the top of the message body in the Message box. The text can be moved anywhere in the message. When users view the email, the alternate text displays as a link. Alternate Text Example:[[2]](#footnote-2)   Note: If an image and alternate text are included, then the image is what displays in the email, and the alternate text displays when users hover over the image. If the image does not render properly in the email, then the alternate text does not display.   * Link Expiration Date - This field is optional. Check the box to make the link finite. When checked, the numeric text box is enabled to the right of the checkbox. Enter a date in the text box or use the calendar option to select a date. The date must be in the future. The link expires at 11:59 p.m. in the user's time zone on the date defined. Note: This is not the time zone of the administrator generating the links. This is the time zone of the user who accesses the link.   Once all required fields are completed, click Insert to add the deep link to the email. There may be several minutes of processing time to add the link once the Insert button is clicked. By default, the link displays at the top of the message body but can be moved anywhere in the email.  Considerations   * Anonymous deep linking is supported where users are routed to their applicable end point. Availability is still defined by the anonymous user group. If a user is routed to a page to which they do not have access, then an alternate page displays in place of the link. * If a deep link is generated with a base URL for which the recipients of the email do not meet the availability criteria, then the base URL reverts to the default URL for those recipients only. |
| Message | Enter the message for recipient. The following options are available for configuring the message:   * Tags - Tags may be used in this field. To view a list of available tags, click the Display a list of tags link. * WYSIWYG Tool - The WYSIWYG (What You See Is What You Get) tool provides configuration tools, such as images, fonts, colors, formatting, and tables. There is also a Copy from Word feature that enables administrators to import from Microsoft Word, preserving the formatting used in the Word document. HTML code can also be used. The system only accepts certain customizable HTML elements in the WYSIWYG Editor. Elements that are not acceptable display as text. See Safe Listed Customizable Elements.   The top toolbar of the WYSIWYG tool contains configuration options. The bottom toolbar is used to switch from design to HTML mode, as well as preview the email.  See the WYSIWYG Tool Considerations below for important considerations when using the WYSIWYG tool.  When configuring emails, a message appears in red at the top of the page, alerting you that files uploaded through the Image or Document Manager are stored on a publicly accessible server. The maximum file size is 3MB. |

Save/Cancel

Once all fields have been completed, click Save. Or, click Cancel to cancel creating the email.

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

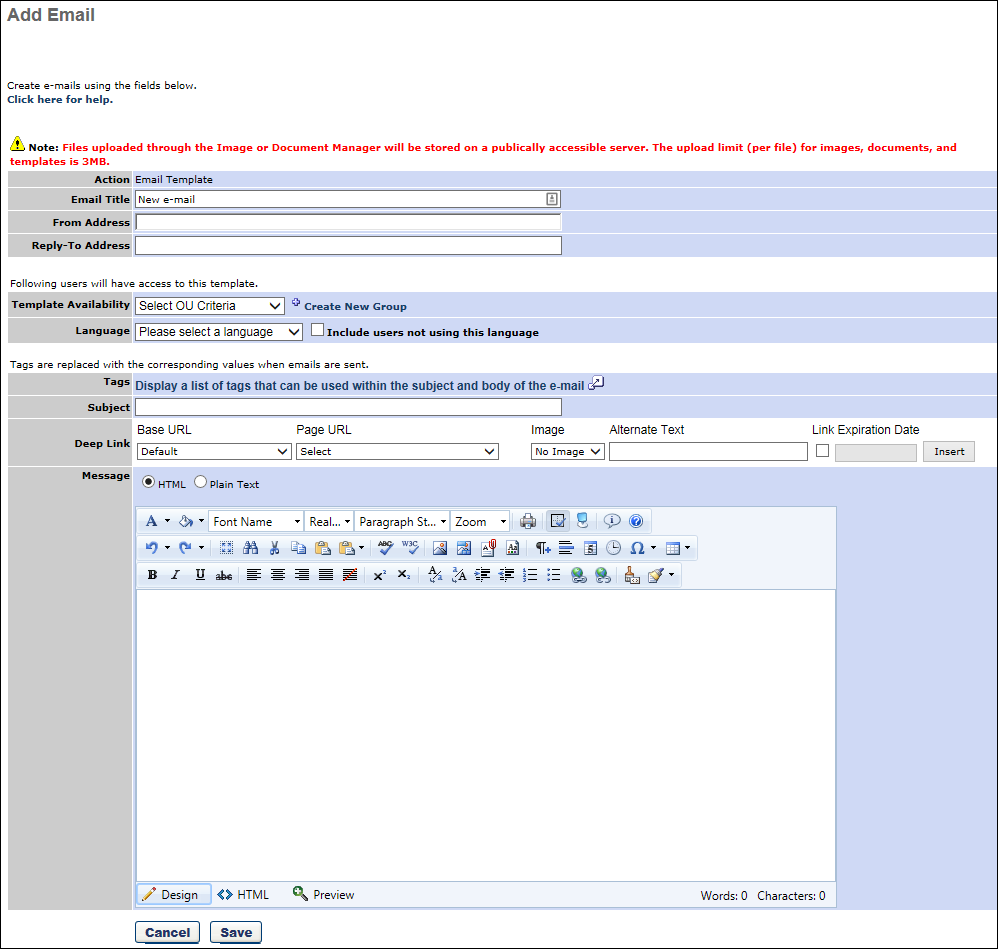
* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

WYSIWYG Tool Considerations

The following are important considerations when using the WYSIWYG tool:

* The Telerik editor demo website ([**http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx**](http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx)) is provided for reference purposes only. The editor available in Email Administration is a different version than the demo editor on the website, and there may be features that work differently or are missing. Hence, all features of the editor may not function in the same way as demonstrated in the demo editor.
* Editor Limitations:
  + Microsoft Outlook does not display media files embedded in the editor.
  + The paste feature may not paste some HTML content when done in the Design mode, for example "iframes." This can be done via HTML mode instead.
  + Some media file codes are taken in by the editor but may not display in the emails received by the user.
  + HTM files successfully uploaded via the Document Manager in the editor may not be displayed accurately in Outlook.
  + Preview may not be identical to how a specific email client renders the email.
  + "Paste" may not always paste the entire HTML content in design mode.
  + "Select All" does not select all the content in design mode.
* Known Browser Limitations:
  + Firefox
    - The remove alignment button is not compatible with Firefox.
    - "Select All" does not select the horizontal lines when the editor is used in Firefox.
    - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
    - The "Remove Alignment" feature may not work as expected in Firefox.
  + Internet Explorer
    - In Internet Explorer 8, the HTM file that is uploaded may show as distorted in design mode.
    - In Internet Explorer, when a user uploads a HTM file using the Template Manager while setting up an email, the uploaded HTM file may have a slightly different layout and formatting.
    - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
* CSS Limitations: Some features such as tables, CSS classes, and styles may not be displayed as expected in certain email programs. As a best practice, please avoid the use of the CSS options.
  + The CSS class is not applied for the Document Manager if they are nested CSS classes.
  + The following reference link provides details about which email clients support which type of CSS: [**http://www.campaignmonitor.com/css/**](http://www.campaignmonitor.com/css/). Users can view the email using a browser to show the entire contents of the email properly.
* Portal Security - If you have not requested to allow HTML tags, CSS, JavaScript, etc on your portal, you may see that some parts of the system no longer allow unsafe elements. You can opt out of this security measure by logging a case with Global Customer Support to enable bypass XSS validation. By bypassing this validation, Cornerstone will require you to agree to the security risk exposure this may cause. For more details on supported customizable elements: See Safe Listed Customizable Elements.

Note: A detailed demo of all features in the editor is available at <http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx>. Descriptions of each option in the toolbar are provided at <http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx>.



Email Management Overview

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

Email Administration

Email Administration allows administrators to create and edit emails and associate these emails with pre-defined triggers. Email tags can be included in email templates, and they allow you to automatically substitute specific information, such as the user's name, the approver's name, the price of the training, the date the request was made, etc., in any new email created. Emails can be configured to be sent to specific users as well as users in specific roles, such as training approvers, cost center approvers, or the employee's manager.

* Emails are sent when an action occurs if they are based on a time frame.
* If an email is based on a time frame, (Training is Due, Session Start Date, etc.) then the email is sent based on the event date of the activity.
  + Example: If a session starts in three days at 8:30 am, the 3-day reminder will go out three days prior at 8:30 am.
  + Example: If activity is an online course with a due date and a 3-day reminder email, the 3-day reminder will go out three days prior at midnight.
  + For more information about configuring time-based (Reminder) emails, see the Type row in the Title and Email section of the Create New Email page. The Reminder bullet discusses how to configure such emails. See Email - Create on page 79 for additional information.

To properly utilize Email Management, an organization's email server must be set up to accept TLS encrypted emails. If this is not done, users may not be able to receive the proper emails. If the server is not set up to accept TLS encrypted emails, contact Global Customer Support for assistance.

To access Email Administration, go to Admin > Tools > Core Functions > Email Management.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email - Edit From Address | Grants ability to edit the "from" address when creating or modifying an email trigger. In addition, the Allow user to change email address option must be selected in Email Preferences. This permission works in conjunction with the Global Email Administration - Manage permission. This is an administrator permission. | Core Administration |

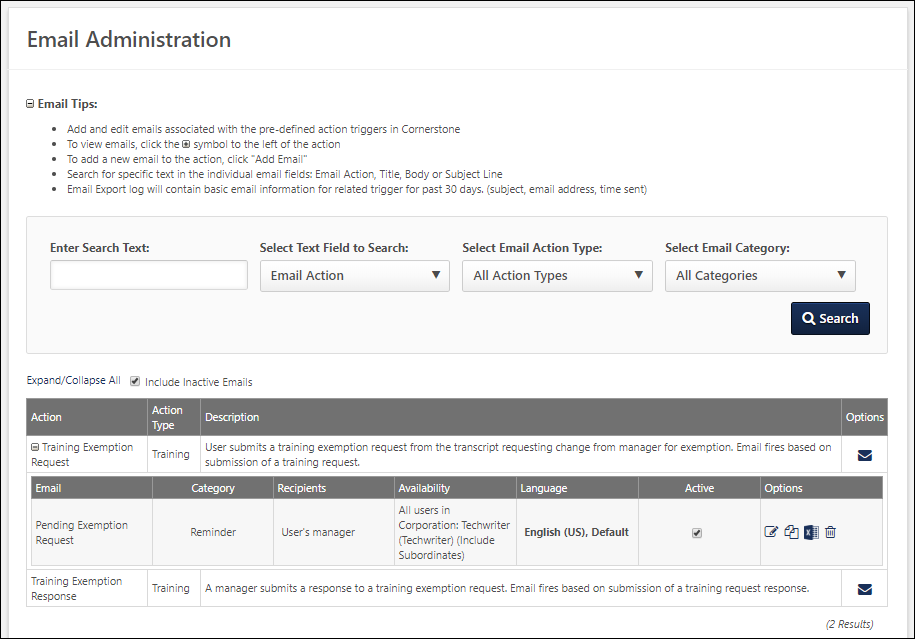
|  |  |  |
| --- | --- | --- |
| Email Preferences - Manage | Grants ability to manage Email Preferences, which includes defining end users' ability to change their email address and the associated email notifications when emails are changed. This is an administrator permission. | Core Administration |

|  |  |  |
| --- | --- | --- |
| Emails by Learning Object - Manage | Grants access to create, edit and delete custom email templates/triggers at the learning object level. When viewing Course Console, this permission also grants ability to view and manage email triggers at the LO level. This permission works in conjunction with the Course Catalog - Update and Course Catalog - View permissions. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User. This is an administrator permission. | Learning - Administration |

|  |  |  |
| --- | --- | --- |
| Emails by Learning Object - View | Grants access to view custom email triggers at the learning object level. When viewing Course Console, this permission also grants ability to view email triggers at the LO level. This permission works in conjunction with the Course Catalog - Update and Course Catalog - View permissions. This permission can be constrained by OU, User's OU, User's Self and Subordinates, and User. This is an administrator permission. | Learning - Administration |

|  |  |  |
| --- | --- | --- |
| Global Email Administration - Manage | Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission. | Core Administration |

|  |  |  |
| --- | --- | --- |
| Global Email Administration - View | Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission. | Core Administration |



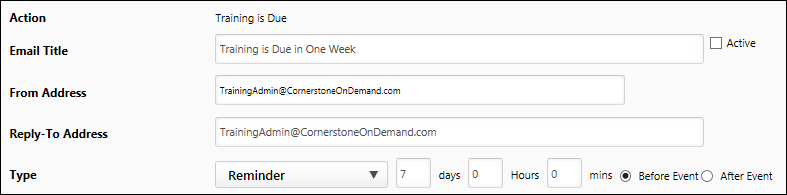
Email Triggers

This topic contains a list of all available email triggers and their descriptions: See Email Triggers on page 154 for additional information.

Notes Regarding Email Modification

Modifications to an email trigger will not affect any emails that have already been queued to be sent, and only Reminder type emails will enter the email queue.

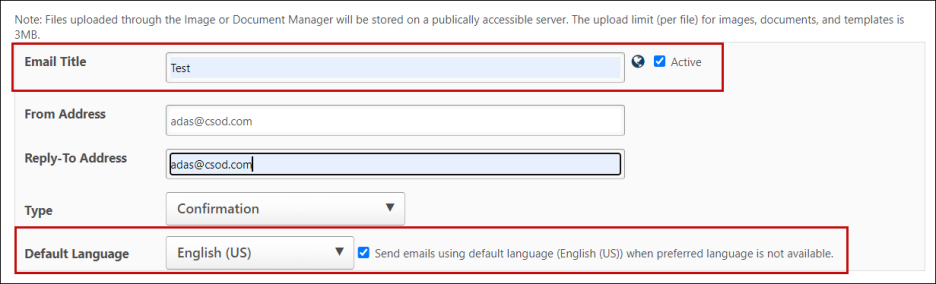
* Reminder Type: Before Event - These emails are added to the email queue at the time the object is associated with the user. For example, if a Reminder type email is configured to be sent two weeks before a learning object's due date, then that email is added to the queue when the user registers for the learning object (LO).
* Reminder Type: After Event - These emails are added to the email queue when the event occurs. For example, if a Reminder type email is configured to be sent two days after a LO's due date, then that email is added to the queue when that LO's due date has passed.



If an email is not a Reminder type email, then the email will not enter the email queue, and it will inherit the email configurations that are set at the time the email is triggered. For example, a Training is Completed - Confirmation type email will automatically be sent when a user completes their LO, and the email that is sent will match the configurations that exist at the time the email is triggered.

If an object is configured to use Custom Emails, then only emails that are configured specifically for that object are utilized. For example, LOs configured via the Course Catalog to use Custom Emails will only use emails as they are configured for the LO in Course Catalog. Another example is that performance review tasks that are configured in the Review Workflow step to use Custom Emails will only use emails as they are configured for the performance review task in the Review Workflow step. In both examples, administrators must manually enable each email they want to fire in the Custom Emails section.

The administrators can now localize custom emails without having to set up and maintain custom email templates for every language active in a portal. Localize the email title, subject, and body or text by accessing the globe icon or through the language dropdown as in the standard or system email feature. The checkbox called SEND EMAILS USING DEFAULT LANGUAGE WHEN PREFERRED LANGUAGE IS NOT AVAILABLE which sends emails in the default language if no preferred language is set. The administrators can change the default language setting of a custom email via the language dropdown.



Search for an Email Trigger

Use the following search fields and filters to search for a specific email trigger:

1. Enter Search Text - This search field enables you to search for an email trigger by email action, subject line, or body text. The search is performed based on which option is selected in the Select Text Field to Search drop-down menu. By default, the search is performed by Email Action.
2. Select Text Field to Search - From the drop-down menu, select whether the search is conducted on email actions, subject lines, or email body.
   1. Email Action - Select this option to search the text of the email actions (i.e., the names of the email triggers).
   2. Email Subject Line - Select this option to search the text of the email subject lines in previously created emails.
   3. Email Body - Select this option to search the text of the email bodies associated with the previously created emails.
3. Select Email Action Type - Select an action type from the drop-down menu to filter the email triggers by a specific action type. The action types represent email trigger groupings related to different areas of the system.
4. Select Email Category - Select an email category from the drop-down menu to filter the email triggers by a specific category, such as Confirmation, Notification, Reminder, or Promotional.

View Email Triggers

Use the following options to control how email triggers are displayed on the page:

1. Expand/Collapse All - Select this link to expand all triggers. When selected again, this collapses all triggers.
2. Include Inactive Emails - Select this option to include inactive emails in search results.
3. Expand  - Select this icon next to an email action to view the existing emails associated with the action. This option is only available if the email trigger has at least one existing email configured.

Add Email Trigger

To add a new email, select the Add Email option  in the Options column. See Email - Create on page 79 for additional information.

Email Options

The following options may be available for an email trigger:

1. Active - Select this option to make the email trigger active or inactive. When an email trigger is made inactive, a pop-up opens to confirm the action. This is intended to prevent the unintentional deactivation of emails.
2. Edit  - Select this icon to edit the existing email trigger.
3. Copy  - Select this icon to copy the existing email trigger.
4. Export Log  - Select this icon to export the email activity log for the email trigger. The email log is a basic Excel report showing to whom the email was sent for the last 30 days. See Email Export Log on page 91 for additional information.
5. Delete  - Select this icon to remove the existing email trigger.

See also:

* [**Email Tags**](#_Ref935269906)
* [**Email Triggers**](#_Ref240661698)
* [**Outlook Options**](#_Ref-41876944)

Email - Create

Emails can be created to communicate important information to recipients. The Create New Email page is separated into the following four sections:

* Languages
* Title and Address
* Recipient and Availability
* Message

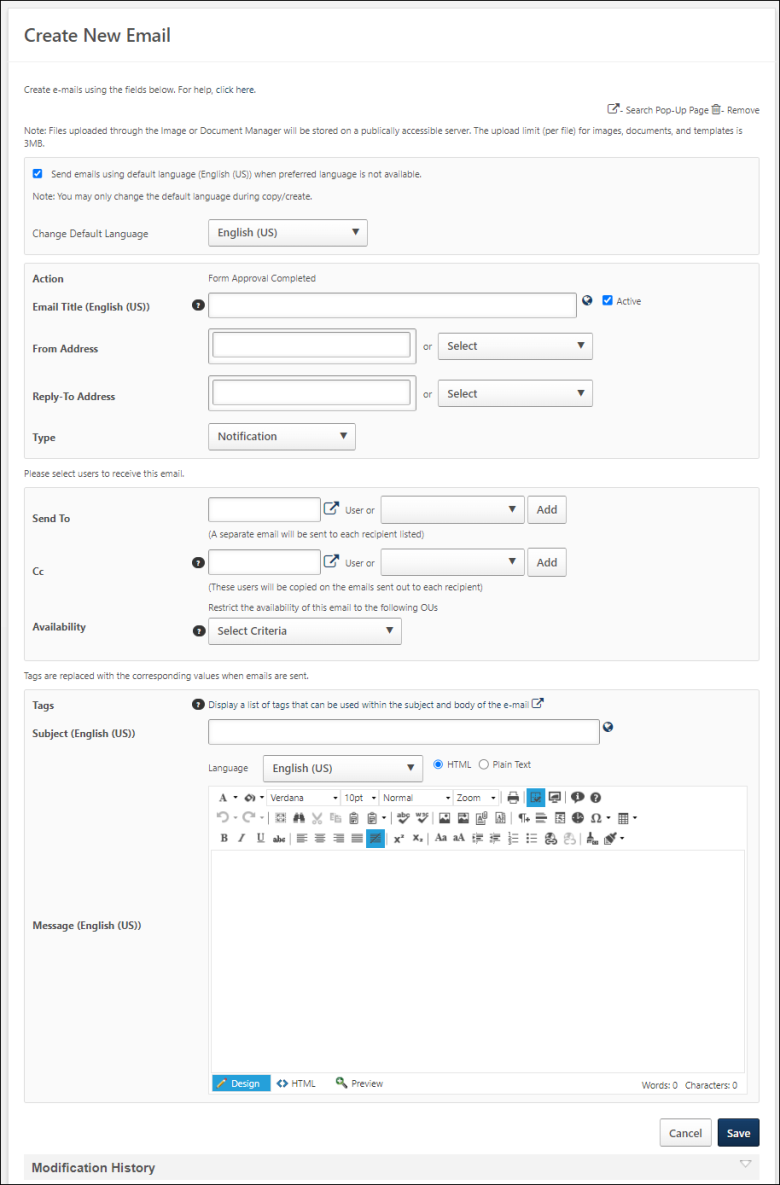
To create an email, go to Admin > Tools > Core Functions > Email Management. Then, click the Add Email icon  in the Options column of the email action for which you would like to create an email. This opens the Create New Email page.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Email - Edit From Address | Grants ability to edit the "from" address when creating or modifying an email trigger. In addition, the Allow user to change email address option must be selected in Email Preferences. This permission works in conjunction with the Global Email Administration - Manage permission. This is an administrator permission. | Core Administration |

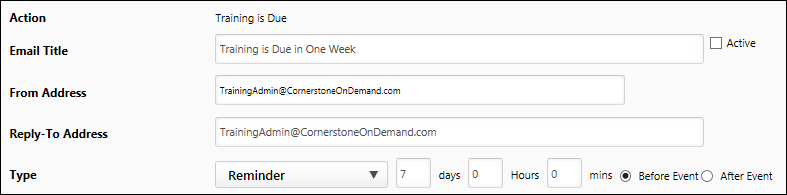
|  |  |  |
| --- | --- | --- |
| Global Email Administration - Manage | Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission. | Core Administration |



Notes Regarding Email Modification

Modifications to an email trigger will not affect any emails that have already been queued to be sent, and only Reminder type emails will enter the email queue.

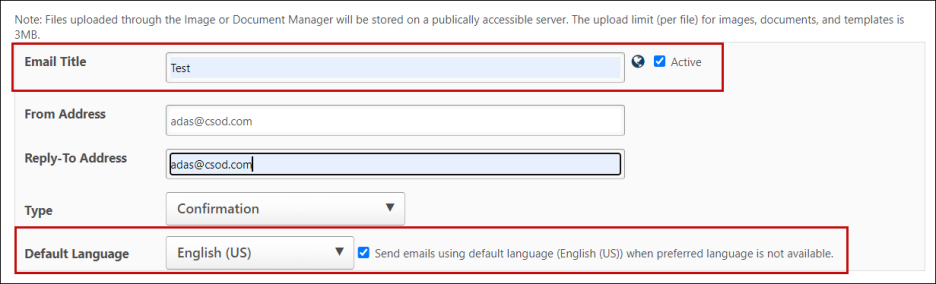
* Reminder Type: Before Event - These emails are added to the email queue at the time the object is associated with the user. For example, if a Reminder type email is configured to be sent two weeks before a learning object's due date, then that email is added to the queue when the user registers for the learning object (LO).
* Reminder Type: After Event - These emails are added to the email queue when the event occurs. For example, if a Reminder type email is configured to be sent two days after a LO's due date, then that email is added to the queue when that LO's due date has passed.



If an email is not a Reminder type email, then the email will not enter the email queue, and it will inherit the email configurations that are set at the time the email is triggered. For example, a Training is Completed - Confirmation type email will automatically be sent when a user completes their LO, and the email that is sent will match the configurations that exist at the time the email is triggered.

If an object is configured to use Custom Emails, then only emails that are configured specifically for that object are utilized. For example, LOs configured via the Course Catalog to use Custom Emails will only use emails as they are configured for the LO in Course Catalog. Another example is that performance review tasks that are configured in the Review Workflow step to use Custom Emails will only use emails as they are configured for the performance review task in the Review Workflow step. In both examples, administrators must manually enable each email they want to fire in the Custom Emails section.

The administrators can now localize custom emails without having to set up and maintain custom email templates for every language active in a portal. Localize the email title, subject, and body or text by accessing the globe icon or through the language dropdown as in the standard or system email feature. The checkbox called SEND EMAILS USING DEFAULT LANGUAGE WHEN PREFERRED LANGUAGE IS NOT AVAILABLE which sends emails in the default language if no preferred language is set. The administrators can change the default language setting of a custom email via the language dropdown.



Language

| Field Name | Description |
| --- | --- |
| Send emails using default language when preferred language is not available | This option is only available if multiple languages are enabled for the portal. When this option is selected, users whose languages are not localized in the template will receive the email in the default language specified in the Change Default Language field. The default language is also displayed within the description of this option. When unchecked, users whose languages are not localized in the template will not receive the email. |
| Change Default Language | This option is only available if multiple languages are enabled for the portal. This option provides the ability to select the default language for the email template. If the email template is not available in a user's language, the email is displayed in the template's default language. Note: The default language can only be changed when creating or copying an email template.  The default language of the email is displayed next to the Email Title, Subject, and Message fields inside the email template. |

Title and Address

Complete the following information in the Title and Address section:

| Field Name | Description |
| --- | --- |
| Email Title | Enter a title for the email. If multiple languages are enabled for the portal, a Translate (Globe) icon is available to the right of the Email Title field. Administrators can select this icon to translate the title into other available languages. Note: When editing or copying an email template, this field is always displayed in the email template's default language. To view the field text in a different language, select the Translate icon. |
| Active | Check the Active box to activate the email. If checked, the email becomes live upon clicking Save. |
| From Address | Enter the from address, or select one of the default addresses in the drop-down menu. Note: You must have the appropriate permission to edit this field.   * Default addresses can be configured for the From Address field through Corporate Preferences. Administrators can only select default email addresses that are active in Corporate Preferences. See Corporate Preferences. * Email addresses must be entered in a valid email address format. |
| Reply-To Address | Enter the address to which recipients can reply to the email, or select one of the default addresses in the drop-down menu.   * Default addresses can be configured for the Reply-To Address field through Corporate Preferences. Administrators can only select default email addresses that are active in Corporate Preferences. See Corporate Preferences. * Email addresses must be entered in a valid email address format. |
| Type | Select an email type from the Type drop-down. Some types may not be available for the email trigger. The following types may be available:   * Confirmation - This email type confirms that an action has taken place, such as registration or cancellation. The Confirmation, Notification, and Promotional email types are used for organizational purposes so that administrators can categorize email triggers and more quickly locate certain email triggers when searching from the Email Management page. * Notification - This email type notifies the recipient that something has occurred, such as when an approver makes a training decision. The Confirmation, Notification, and Promotional email types are used for organizational purposes so that administrators can categorize email triggers and more quickly locate certain email triggers when searching from the Email Management page. * Promotional - This email type can be used to advertise or promote some message or functionality. For example, the Training is Completed email trigger could be configured to promote an upcoming conference or training seminar when a completes a training. The Confirmation, Notification, and Promotional email types are used for organizational purposes so that administrators can categorize email triggers and more quickly locate certain email triggers when searching from the Email Management page. * Reminder - This email type serves as a reminder before or after any action, providing extra notice of upcoming events or deadlines. When "Reminder" is selected, additional options appear that allow you to determine the amount of time before or after the action to send a reminder. Emails that typically work as a reminder are those with predefined dates. Some examples include: ILT Start Date, Training is Due, Certification Period Expiration, and task reminder emails.   + Use Case: An administrator would like a reminder email to be sent the day before a training item is due. She selects "Reminder" in the Type field. She enters "1" in the days field and selects the Before Event option. These settings will trigger the email to be sent one day before the training is due.   To configure the settings for a Reminder type email:   1. Select "Reminder" from the Type field. This enables the reminder options to appear. 2. Enter a number of days in the days field to define the number of days before or after the event occurs that the email is triggered. This refers to calendar days. 3. Enter a number of days in the Hours field to define the number of hours before or after the event occurs that the email is triggered. 4. Enter a number of days in the mins field to define the number of minutes before or after the event occurs that the email is triggered. 5. Select the Before Event option to trigger the email the selected number of days/hours/minutes before the event occurs. 6. Select the After Event option to trigger the email the selected number of days/hours/minutes after the event occurs.   Note: The word "Event" for reminder emails does not refer specifically to ILT events. The word refers to the action that triggers the reminder email to be sent. |
| Calendar Options | Available for the ILT Session Register email trigger, this option allows the email creator to specify what sort of calendar invitation will be sent to users. The following options are available:   * Meeting Invite * Calendar Attachment * None |
| Email Format | For the ILT Session Register email trigger, Email Format options are available. The administrator can choose between the following two radio button options:   * Outlook - Select this option to ensure the email meeting invitation will be formatted correctly for Outlook. * Other - Select this option to ensure the email meeting invitation will be formatted correctly for other email providers, such as Gmail, Yahoo, and others. This option is selected by default. |

Recipient and Availability

Complete the following information in the Recipient and Availability section:

| Field Name | Description |
| --- | --- |
| Send To | Select either a specific user to receive the email, or select from the drop-down a list of relevant job roles. Depending on what type of email you previously chose, the job role drop down may populate with different fields. Once you have selected a user or a role, you must click the Add button.  At least one recipient must be specified. |
| Cc | Select either a specific user or select a recipient from the drop-down list. Once you have selected a user or a role, you must click the Add button. Note: The users that are cc'd are not included in the email log file. Only the users in the Send To field appear in the email log file.  Note: The Cc field does not observe availability rules. To enforce availability rules, recipients should be added to the Send To field.   * Users or recipients already selected in the Send To field cannot be added to the Cc field. * Adding recipients to the Cc field will add these users to the Cc field of each Email that is sent. * If a group of recipients is listed in the Cc field, a separate Email is sent to every user in that group. Only one user from that group will be cc'd on each Email sent out; cc'ing a group does not mean that one Email will be sent with everybody in that group listed in the Cc field. * The system will link the relationship between the user in the Send To and the users in the Cc field. For example, if the Training Request Approver, Cost Center Approver, User's Manager are all related to the Student. If User's Manager is listed in the Sent To field and Student and Cost Center Approver are listed in the Cc field, then one Email will be sent out for each user's manager. Each Email sent to a user's manager will have the student and the student's cost center approver in the Cc field. * An Email cannot be sent out that does not have a user in the Send To field. If the user does not have a manager, then no Email will be sent. * If two groups of recipients are listed in the Send To field, then a separate email is sent to each recipient in both groups. The users in the Cc field are cc'd on both of those Emails. For example, if User's Manager and Student are listed in the Send To field and Cost Center Approver is listed in the Cc field, then an email will be sent to every student's manager and every student. The Cost Center Approver of the student will be cc'd on the email to the manager and on the email to the student. |
| Availability | Choose to restrict the availability of the email to a specific OU. Availability makes sure that only the recipients confined within the selected OU receive emails.  Recruitment Type Emails  For Recruitment type emails that can be sent to internal applicants, the availability setting defined for emails sent to "Internal Applicant" is associated with the organizational unit (OU) defined for the job requisition to which the internal applicant applied. This is the OU/Division that is defined for the job requisition to which the internal user applies.  For emails configured to be sent to internal users (not applicants), such as Hiring Manager or Requisition Owner, the availability is based on the Division OU to which the user belongs.  As a best practice when configuring the Availability field, it is best to account for the role of the recipient as well as availability setting to ensure that internal applicants, external applicants, and internal users receive the appropriate emails.  Click [**here**](file:///C:/cornerstone-csx-online-help/Content/Resources/Images/Availability%20Rules%20by%20OU%20-%20Recruiment%20Emails%20-%20Internal%20App.png) to view the availability rules by OU.  Click [**here**](file:///C:/cornerstone-csx-online-help/Content/Resources/Images/Availability%20Rules%20by%20Recipient%20-%20Recruiment%20Emails%20-%20Internal%20App.png) to view the availability rules by recipient.  Invite to Apply Email  When configuring the Invite to Apply email, the Availability settings are bypassed for external users. |

Message

Complete the following information in the Message section:

| Field Name | Description |
| --- | --- |
| Tags | Click the Display a list of tags link to view tags available to use in the Subject or Message fields. The tags that are available to include are dependent upon the email type selected. When the email is sent, the tags are replaced with actual information. The tags must be entered exactly as they are listed, and they are case sensitive. For example, to address the email to the trainee (the person who must take the training), enter: "Dear TRAINEE.FIRST.NAME TRAINEE.LAST.NAME,". The field would be replaced with the relevant information. |
| Subject | Enter a subject for the email message. The subject is displayed to the recipient. Tags can be used in this field. If multiple languages are enabled for the portal, a Translate (Globe) icon is available to the right of the Subject field. Administrators can select this icon to translate the subject into other available languages. Note: When editing or copying an email template, this field is always displayed in the email template's default language. To view the field text in a different language, select the Translate icon. |
| Message | Enter the message for recipient. The following options are available for configuring the message:   * Tags - Tags may be used in this field. To view a list of available tags, click the Display a list of tags link. * WYSIWYG Tool - The WYSIWYG (What You See Is What You Get) tool provides configuration tools, such as images, fonts, colors, formatting, and tables. There is also a Copy from Word feature that enables administrators to import from Microsoft Word, preserving the formatting used in the Word document. HTML code can also be used. The system only accepts certain customizable HTML elements in the WYSIWYG Editor. Elements that are not acceptable display as text. See Safe Listed Customizable Elements.   + The top toolbar of the WYSIWYG tool contains configuration options. The bottom toolbar is used to switch from design to HTML mode, as well as preview the email.   + Note: Documents cannot be deleted from the Document Manager once they are added. This is because the document may be in use in emails that have already been sent to users. This prevents errors with document links after emails are sent.   + See the WYSIWYG Tool Considerations below for important considerations when using the WYSIWYG tool.   When configuring emails, a message appears in red at the top of the page, alerting you that files uploaded through the Image or Document Manager are stored on a publicly accessible server. The maximum file size is 3MB.  If multiple languages are enabled for the portal, a Language drop-down is available above the Message field. Administrators can select a language from this drop-down to translate the email message into other available languages. Note: When editing or copying an email template, this field is always displayed in the email template's default language. To view the field text in a different language, select the appropriate language from the Language drop-down menu. |

Once all fields have been completed, click Save.

Modification History

A Modification History section is available when editing an email template. This section captures each time an email template is created or modified. This section displays the name of the user who created or modified the template and the date and time at which this occurred.

Conditions

Conditions can be set for an email trigger so that the email is only triggered when certain conditions are met. For example, the Session Transcript Status Changed by Roster Submission email trigger can be configured so that the email is only triggered if the student's LO is in a specific Transcript status, such as Pending Evaluation or No Show.

* STUDENT.TRANSCRIPT.STATUS==TRANSCRIPT.STATUS.[Enter the desired status here (e.g., NOSHOW, PENDINGEVALUATION)]

The Conditions section is only available if the email trigger can utilize conditions.

Impacts of Localization on Critical Emails

It is important to note that an email may not be sent to a recipient depending on the configuration and localization of the email template. The behavior of the email trigger depends on the configuration of the email template.

* If the email template is localized in the recipient's language, then the system sends the email in this language.
* If the email template is not localized in the recipient's language, then the behavior depends on whether the Send emails using default language when preferred language is not available option is selected.
  + If this option is selected, then the system sends the email in the template's default language.
  + If this option is not selected, then the email is not sent to the recipient.

While this is important for all emails, it is extra important to keep this in mind for the following email triggers:

* Admin Password Change
* Forget Password
* Forget Username
* Login Message Email
* User Password Change

WYSIWYG Tool Considerations

The following are important considerations when using the WYSIWYG tool:

* The Telerik editor demo website ([**http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx**](http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx)) is provided for reference purposes only. The editor available in Email Administration is a different version than the demo editor on the website, and there may be features that work differently or are missing. Hence, all features of the editor may not function in the same way as demonstrated in the demo editor.
* Editor Limitations:
  + Microsoft Outlook does not display media files embedded in the editor.
  + The paste feature may not paste some HTML content when done in the Design mode, for example "iframes." This can be done via HTML mode instead.
  + Some media file codes are taken in by the editor but may not display in the emails received by the user.
  + HTM files successfully uploaded via the Document Manager in the editor may not be displayed accurately in Outlook.
  + Preview may not be identical to how a specific email client renders the email.
  + "Paste" may not always paste the entire HTML content in design mode.
  + "Select All" does not select all the content in design mode.
* Known Browser Limitations:
  + Firefox
    - The remove alignment button is not compatible with Firefox.
    - "Select All" does not select the horizontal lines when the editor is used in Firefox.
    - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
    - The "Remove Alignment" feature may not work as expected in Firefox.
  + Internet Explorer
    - In Internet Explorer 8, the HTM file that is uploaded may show as distorted in design mode.
    - In Internet Explorer, when a user uploads a HTM file using the Template Manager while setting up an email, the uploaded HTM file may have a slightly different layout and formatting.
    - The Add button within Document Manager does not allow for multiple selection of documents in Internet Explorer and Firefox.
* CSS Limitations: Some features such as tables, CSS classes, and styles may not be displayed as expected in certain email programs. As a best practice, please avoid the use of the CSS options.
  + The CSS class is not applied for the Document Manager if they are nested CSS classes.
  + The following reference link provides details about which email clients support which type of CSS: [**http://www.campaignmonitor.com/css/**](http://www.campaignmonitor.com/css/). Users can view the email using a browser to show the entire contents of the email properly.
* Portal Security - If you have not requested to allow HTML tags, CSS, JavaScript, etc on your portal, you may see that some parts of the system no longer allow unsafe elements. You can opt out of this security measure by logging a case with Global Customer Support to enable bypass XSS validation. By bypassing this validation, Cornerstone will require you to agree to the security risk exposure this may cause. For more details on supported customizable elements: See Safe Listed Customizable Elements.

Note: A detailed demo of all features in the editor is available at <http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx>. Descriptions of each option in the toolbar are provided at <http://demos.telerik.com/aspnet-ajax/editor/examples/default/defaultcs.aspx>.

Email Export Log

When exporting an email log, the email log contains all emails sent for the related trigger within the past 30 days. Due to auditing functionality, the "Forget Password" email trigger may display emails older than 30 days.

Emails that are sent to users who are included in the Cc field for the email trigger do not appear in the email log. For example, if Manager is selected in the Send To field and Indirect Manager is selected in the Cc field, then the email to the manager will be included in the email log, but the email to the Indirect Manager will not.

To view the email log for an email trigger, follow these steps:

1. Go to Admin > Tools > Core Functions > Email Management.
2. Click the Expand icon  for an email trigger. This option is only available if the email trigger has at least one existing email configured.
3. Click the Export to Excel  icon.

Permissions

|  |  |  |
| --- | --- | --- |
| PERMISSION NAME | PERMISSION DESCRIPTION | CATEGORY |

|  |  |  |
| --- | --- | --- |
| Global Email Administration - Manage | Grants ability to manage email trigger templates across all active modules in the portal. Enables creating, editing and deleting email message templates for various system actions and workflows. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission. | Core Administration |

|  |  |  |
| --- | --- | --- |
| Global Email Administration - View | Grants view only access to email templates/triggers and email logs at the global level for the portal. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an administrator permission. | Core Administration |

The email log contains the following information for each entry:

1. Email Address - The email address to which the email was sent.
2. Time Sent - The date and time at which the email was sent.
3. Subject - The subject line of the email.

If the email has not been triggered in the past 30 days, then the spreadsheet will be empty.

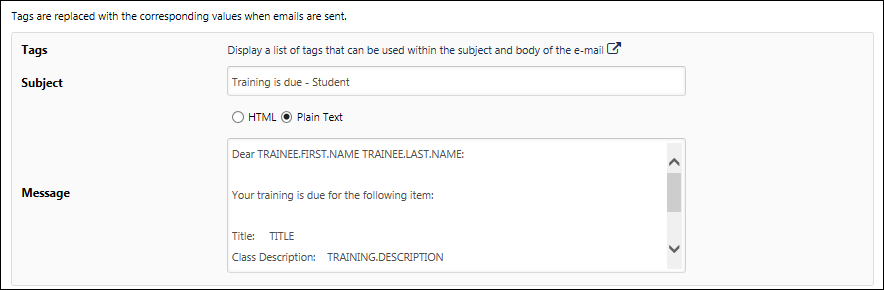
Email Tags

Email tags can be included in email templates that allow you to automatically substitute specific information, such as the User's name, the Approver's name, the Price of the training, the Date of the Request was made, etc., in any new email created. Clicking the Display a list of tags that can be used within the subject and body of the Email link within the new Email template will display the tags that can be used in that specific Email.

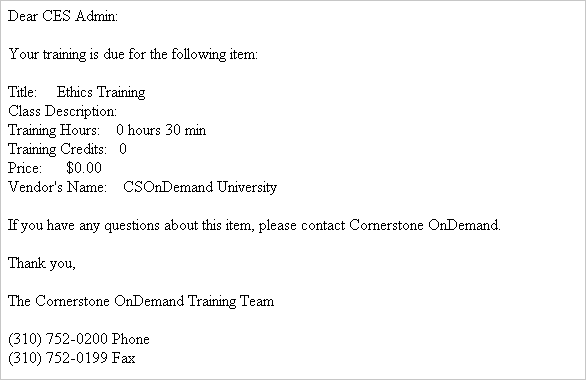
For emails that support the "RECIPIENT.FIRST.NAME" and "RECIPIENT.LAST.NAME" tags, these tags always populate with the name of the person who receives the email. For example, if you have an email where the "To" field is set to "Instructor", if a Session has multiple instructors, using the "INSTRUCTOR.FIRST.NAME" and "INSTRUCTOR.LAST.NAME" tags may not align to the email recipient. However, addressing the email "Dear RECIPIENT.FIRST.NAME RECIPIENT.LAST.NAME" will ensure the name is correct.

The tags used in this example are:

* TRAINEE.FIRST.NAME
* TRAINEE.LAST.NAME
* TITLE
* TRAINING.DESCRIPTION
* DURATION



Example of how these tags would appear to users in an email.



Billing Emails

Unpurchased Items in Shopping Cart

The following tags are available for the Unpurchased Items in Shopping Cart email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the user added the first item to empty shopping cart. |
| CART.LINK | Displays a deep link to the cart owner's shopping cart. In the email text, the tag is replaced with a linked message, Click here to proceed to your Shopping Cart. For portals with SSO enabled, the user is directed to the Shopping Cart page. For portals that require sign-in, the user is directed to the portal's sign-in page. Once signed in, the user is taken to the Shopping Cart page. |
| CART.LIST.HTML | Displays [**HTML list of unpurchased items**](file:///C:/cornerstone-csx-online-help/Content/Resources/Images/Shopping%20Cart%20-%20HTML%20List%20Unpurchased%20Items.png) in the shopping cart. |
| CART.LIST.TEXT | Displays text list of unpurchased items in the shopping cart. Each item listed includes the item name, duration, quantity, and unit price. |
| CART.OWNER.FIRST.NAME | First name of shopping cart owner. |
| CART.OWNER.LAST.NAME | Last name of shopping cart owner. |
| UNSUBSCRIBE.LINK | Deep link to the [**Unsubscribe page**](file:///C:/cornerstone-csx-online-help/Content/User/Learning/Unsubscribe%20from%20Shopping%20Cart%20Notifications.htm), from which the shopping cart owner can unsubscribe from the Unpurchased Items in Shopping Cart email. |

Careers Emails

Check-Ins

The following tags are available for Check-Ins email:

| Tag Name | Description |
| --- | --- |
| CHECK-IN.CREATOR.FIRST.NAME | The first name of the user who created the discussion. |
| CHECK-IN.CREATOR.LAST.NAME | The last name of the user who created the discussion. |
| CHECK-IN.LINK | A hyperlink that takes the user to the check-ins page. |
| CHECK-IN.PARTICIPANT.FIRST.NAME | The first name of a participant in the discussion. |
| CHECK-IN.PARTICIPANT.LAST.NAME | The last name of a participant in the discussion. |
| CHECK-IN.TITLE | The name of the check-in discussion. |

Follow-Ups

The following tags are available for Follow-Ups email:

| Tag Name | Description |
| --- | --- |
| CHECK-INS.FOLLOW-UP.CONTENT | The content of the follow-up. |
| CHECK-INS.FOLLOW-UP.DUE.DATE | The due date for the Follow-up. Will display "soon" when the Follow-Up has no due date. |
| CHECK-INS.FOLLOW-UP.LINK | A hyperlink that takes the user to the Check-In meeting where that follow-up was created. |
| CHECK-INS.FOLLOW-UP.ASSIGNEE.FIRST.NAME | The Follow-Up assignee's first name. Will display "Unassigned" when the Follow-Up has no assignee. |
| CHECK-INS.FOLLOW-UP.ASSIGNEE.LAST.NAME | The Follow-Up assignee's last name. |

Custom Field Tags

Custom Fields

For every custom field defined on the Custom Fields page, there is an associated tag called CUSTOM.[Custom field Email tag name]

* The description for each tag is the name of that custom field.
* CUSTOM.[Custom Field Email Tag] - Each custom tag inserts the text that was entered in that field for this training item as a string.
* If nothing was entered in this field then the tag will not insert anything.

Employee Onboarding Emails

Employee Onboarding Cancelled

The following tags are available for the Employee Onboarding Cancelled email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |
| ONBOARDING.USER.FIRST.NAME | Onboarding user's first name. |
| ONBOARDING.USER.LAST.NAME | Onboarding user's last name. |
| ONBOARDING.USER.PHONE | Onboarding user's phone. |
| ONBOARDING.USER.EMAIL | Onboarding user's email address. |
| ONBOARDING.USER.USERNAME | Onboarding user's user name. |
| ONBOARDING.USER.START.DATE | Onboarding user's start date. |

Employee Onboarding Started

The following tags are available for the Employee Onboarding Started email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |
| ONBOARDING.USER.FIRST.NAME | Onboarding user's first name. |
| ONBOARDING.USER.LAST.NAME | Onboarding user's last name. |
| ONBOARDING.USER.PHONE | Onboarding user's phone. |
| ONBOARDING.USER.EMAIL | Onboarding user's email address. |
| ONBOARDING.USER.USERNAME | Onboarding user's user name. |
| ONBOARDING.USER.START.DATE | Onboarding user's start date. |
| ONBOARDING.USER.FUTURE.POSITION | Pending new Position organizational unit (OU) for onboarding user. |
| ONBOARDING.USER.FUTURE.DIVISION | Pending new Division OU for onboarding user. |
| ONBOARDING.USER.FUTURE.LOCATION | Pending new Location OU for onboarding user. |

Integration Task Assigned

The following tags are available for the Integration Task Assigned email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| INTEGRATION TASK.DUE.DATE | Integration task due date. |
| INTEGRATIONTASK.TITLE | Integration task title. |
| INTEGRATION.TITLE | Integration title. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.POSITION | Recipient's position. |
| TASK.START.DATE | The date on which the form task starts. |

Onboarding Form Assigned

The following tags are available for the Onboarding Form Assigned email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| FORM.DESCRIPTION | Description entered when configuring the form. |
| FORM.TASK.INSTRUCTIONS | Instructions entered for the form task. |
| FORM.TASK.TITLE | Title entered for the form task. |
| FORM.TITLE | Title entered when configuring the form. |
| ONBOARDING.USER.EMAIL | Onboarding user's email address |
| ONBOARDING.USER.FIRST.NAME | Onboarding user's first name |
| ONBOARDING.USER.FUTURE.DIVISION | Pending new Division OU for onboarding user |
| ONBOARDING.USER.FUTURE.LOCATION | Pending new Location OU for onboarding user |
| ONBOARDING.USER.FUTURE.POSITION | Pending new Position organizational unit (OU) for onboarding user |
| ONBOARDING.USER.LAST.NAME | Onboarding user's last name |
| ONBOARDING.USER.HIRE.DATE | Onboarding user's hire date |
| ONBOARDING.USER.PHONE | Onboarding user's phone |
| ONBOARDING.USER.USERNAME | Onboarding user's user name |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |
| TASK.DUE.DATE | The date on which the form task is due. |
| TASK.START.DATE | The date on which the form task starts. |

Onboarding Form Completed

The following tags are available for the Onboarding Form Completed email (new tags appear in red):

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| FORM.DESCRIPTION | Description entered when configuring the form. |
| FORM.ESIGNED.DATETIME | Displays the date and time that the form was electronically signed. |
| FORM.RESPONDER.DIVISION | Division of the user who filled out the form. |
| FORM.RESPONDER.FIRST.NAME | First name of the user who filled out the form. |
| FORM.RESPONDER.LAST.NAME | Last name of the user who filled out the form. |
| FORM.RESPONDER.PHONE | Phone of the user who filled out the form. |
| FORM.RESPONDER.POSITION | Position of the user who filled out the form. |
| FORM.TASK.INSTRUCTIONS | Instructions entered for the form task. |
| FORM.TASK.TITLE | Title entered for the form task. |
| FORM.TITLE | Title entered when configuring the form. |
| ONBOARDING.USER.EMAIL | Onboarding user's email address |
| ONBOARDING.USER.FIRST.NAME | Onboarding user's first name |
| ONBOARDING.USER.FUTURE.DIVISION | Pending new Division OU for onboarding user |
| ONBOARDING.USER.FUTURE.LOCATION | Pending new Location OU for onboarding user |
| ONBOARDING.USER.FUTURE.POSITION | Pending new Position organizational unit (OU) for onboarding user |
| ONBOARDING.USER.LAST.NAME | Onboarding user's last name |
| ONBOARDING.USER.HIRE.DATE | Onboarding user's hire date |
| ONBOARDING.USER.PHONE | Onboarding user's phone |
| ONBOARDING.USER.USERNAME | Onboarding user's user name |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |
| TASK.DUE.DATE | The date on which the form task is due. |
| TASK.START.DATE | The date on which the form task starts. |

W-4 Forms Pending

The following tags are available for the W-4 Forms Pending email:

| Tag Name | Description |
| --- | --- |
| ONBOARDING.USER.FIRST.NAME | Onboarding user's first name. |
| ONBOARDING.USER.LAST.NAME | Onboarding user's last name. |

Form Management Emails

Form Approval Required

The following tags are available for the Form Approval Required email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPROVER.DIVISION | Division of the approver. |
| APPROVER.FIRST.NAME | First name of the approver. |
| APPROVER.LAST.NAME | Last name of the approver. |
| APPROVER.PHONE | Phone of the approver. |
| APPROVER.POSITION | Position of the approver. |
| FORM.RESPONDER.DIVISION | Division of the user who filled out the form. |
| FORM.RESPONDER.FIRST.NAME | First name of the user who filled out the form. |
| FORM.RESPONDER.LAST.NAME | Last name of the user who filled out the form. |
| FORM.RESPONDER.PHONE | Phone of the user who filled out the form. |
| FORM.RESPONDER.POSITION | Position of the user who filled out the form. |
| FORM.TITLE | Title entered when configuring the form. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |

Form Approval Completed

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPROVER.DIVISION | Division of the approver. |
| APPROVER.FIRST.NAME | First name of the approver. |
| APPROVER.LAST.NAME | Last name of the approver. |
| APPROVER.PHONE | Phone of the approver. |
| APPROVER.POSITION | Position of the approver. |
| APPROVAL.STATUS | Status of the approval (approved, denied, returned, etc.). |
| APPROVER.COMMENT | Comments made by approver. |
| FORM.RESPONDER.DIVISION | Division of the user who filled out the form. |
| FORM.RESPONDER.FIRST.NAME | First name of the user who filled out the form. |
| FORM.RESPONDER.LAST.NAME | Last name of the user who filled out the form. |
| FORM.RESPONDER.PHONE | Phone of the user who filled out the form. |
| FORM.RESPONDER.POSITION | Position of the user who filled out the form. |
| FORM.TITLE | Title entered when configuring the form. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |

Form Assigned

The following tags are available for the Form Assigned email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| FORM.DESCRIPTION | Description entered when configuring the form. |
| FORM.TASK.INSTRUCTIONS | Instructions entered for the form task. |
| FORM.TASK.TITLE | Title entered for the form task. |
| FORM.TITLE | Title entered when configuring the form. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |
| TASK.DUE.DATE | The date on which the form task is due. |
| TASK.START.DATE | The date on which the form task starts. |

Form Completed

The following tags are available for the Form Completed email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| FORM.DESCRIPTION | Description entered when configuring the form. |
| FORM.ESIGNED.DATETIME | Displays the date and time that the form was electronically signed. |
| FORM.RESPONDER.DIVISION | Division OU of the user who filled out the form. |
| FORM.RESPONDER.FIRST.NAME | First name of the user who filled out the form. |
| FORM.RESPONDER.LAST.NAME | Last name of the user who filled out the form. |
| FORM.RESPONDER.PHONE | Phone number of the user who filled out the form. |
| FORM.RESPONDER.POSITION | Position organizational unit (OU) of the user who filled out the form. |
| FORM.TASK.INSTRUCTIONS | Instructions entered for the form task. |
| FORM.TASK.TITLE | Title entered for the form task. |
| FORM.TITLE | Title entered when configuring the form. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |
| TASK.DUE.DATE | The date on which the form task is due. |
| TASK.START.DATE | The date on which the form task starts. |

Self-Service Form Submitted

The following tags are available for the Self-Service Form Submitted email (new tags appear in red):

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| FORM.DESCRIPTION | Description entered when configuring the form. |
| FORM.TITLE | Title entered when configuring the form. |
| FORM.RESPONDENT.DIVISION | Division OU of the user who filled out the form. |
| FORM.RESPONDENT.FIRST.NAME | First name of the user who filled out the form. |
| FORM.RESPONDENT.LAST.NAME | Last name of the user who filled out the form. |
| FORM.RESPONDENT.PHONE | Phone number of the user who filled out the form. |
| FORM.RESPONDENT.POSITION | Position organizational unit (OU) of the user who filled out the form. |
| FORM.RESPONDENT.USERNAME | User name of the user who filled out the form. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |

ILT Emails

INSTRUCTOR.LAUNCH.SESSION.LINK Tag

INSTRUCTOR.LAUNCH.SESSION.LINK tag, when incorporated into the body of the ILT Session Becomes Available email, the ILT Session Register email, the Session Start Date email, or the Session Changed email, provides instructor recipients with a functional link will replace the tag when the instructor views the email, and the instructor can click the link to launch their session. This tag only functions for instructors accessing their own sessions.

LAUNCH.SESSION.LINK Tag

LAUNCH.SESSION.LINK tag, when incorporated into the body of the ILT Session Register email, Session Start Date email, or in the Session Changed email, provides email recipients with a customized link which allows them to immediately launch the virtual session by clicking the link. This email tag functions for both single and multi-part sessions. Upon clicking the email link, users are prompted to log in to their portal whether or not the organization uses single sign-on (SSO). If the organization uses SSO, they will be prompted to log in using SSO. If the organization does not use SSO, they will be prompted to log in using their Cornerstone portal credentials.

SCHEDULES Tag

SCHEDULES tag includes the time zone of the ILT Session after the date and time of each part. If a subject is added to a part, the subject displays in the Session details section. This tag is available for the following Emails: Request ILT, Assign ILT, Approve ILT, ILT Register, Waitlist Request, Cancel Session, Exception Request, Grant Exception Request, Cancellation Registration, ILT Session Seats Available, Session Change.

SCHEDULES.DETAILS Tag

SCHEDULES.DETAILS tag is available in ILT Emails which display the Session details in a format that is easier to understand as an end user. The room of the location and the address of the parent location are displayed instead of the location hierarchy being displayed as a string as it is in the SCHEDULES tag. If a subject is added to a part, the subject displays in the Session details section. This tag is available for the following Emails: Request ILT, Assign ILT, Approve ILT, ILT Register, Waitlist Request, Cancel Session, Exception Request, Grant Exception Request.

SCHEDULES.CHANGED

SCHEDULES.CHANGED condition tag is available in the Session Changed email trigger. When added as a condition, the email will only fire when a change is made to any of the fields on the Parts Schedule page.

WITHDRAW.SESSION.LINK

WITHDRAW.SESSION.LINK tag is used to add a session withdrawal link to an email. When incorporated into the body of the Session Start Date email or the Session Changed email, users will see a link instead of a tag. Clicking this link navigates them to the Cancel Registration page for the selected event. The learner must select a reason for withdrawal and then submit the withdrawal on this page. This tag only functions for registered users. Note: This link is SSO-enabled, but can also be used by organizations that do not use SSO.

INSTRUCTOR.REQUEST.LINK

INSTRUCTOR.REQUEST.LINK tag allows you to add a link to the View Instructor Request page to a Request Instructor email. When instructors receive this request email, they will see a link instead of a tag. Clicking this link navigates them to the View Instructor Request page for the session. The instructor can then respond to the request. Note: This link is SSO-enabled, but can also be used by organizations that do not use SSO.

ILT Tags in Webex Virtual Session Emails

When the SCHEDULES, SCHEDULES.HTML, or SCHEDULES.DETAILS tag is included in emails for Webex virtual sessions, the tags display the Webex URL, Webex Meeting ID, and Webex Meeting Password.

Notes:

* This feature is controlled by a backend setting that is turned off by default. If the setting is not enabled, the email tags function as designed without the Webex features. To enable the setting for your portal, contact Global Customer Support.
* This feature is only available for organizations that have an account with Webex and that also have the ILT module enabled.
* It is important to note that enabling this feature could allow users who are not on the session roster to access a Webex session via the login information included in the email.

Considerations

* Multi-Part Sessions - For multi-part sessions, the schedule tags list all session parts. A unique Webex session is created for each session part, which includes a URL, meeting ID, and password value. Therefore, separate Webex access information is listed for each session part.
* Recording Attendance -
  + If a user accesses a session from outside of the portal, the user's attendance is still recorded on the roster, provided the user's Webex roster information matches that of the session roster in the portal.
  + Attendance is only recorded for users that are on the session roster. If a user attends a Webex session but is not on the session roster, their attendance is not recorded on the session roster.
* Editing Session Parts in ILT Administration - Edits that are made to a session part within ILT Administration do not change the Webex access information.
* Editing Session Parts in Webex - Edits that are made to a session part within Webex do not initiate an update to the session within ILT Administration. If edits are made to a session part via Webex, the integration of the session between Webex and the portal is broken. For this reason, edits to a session should always be made in ILT Administration. Edits to a session should never be made in Webex.

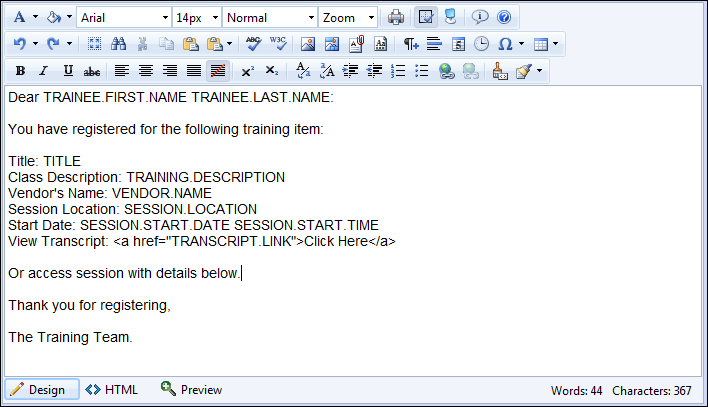
Available Triggers

The tags are available for the following email triggers:

* Assign ILT Session
* Request ILT Session
* ILT Session Register
* Approve ILT Session
* Waitlist Request
* Grant Waitlist Request
* Deny Waitlist Request
* Waitlist Acceptance Deadline
* Waitlist Expires
* Exception Request
* Grant Exception Request
* Deny Exception Request
* Cancel Registration (without withdrawal penalty)
* Cancel Registration (with withdrawal penalty)
* ILT Session Substitution
* Withdraw from Waitlist
* Session Transcript Status Changed by Roster Submission
* Request WebCast
* Session Pre-Work Due Date
* Session Post-Work Due Date
* ILT Session Becomes Available
* ILT Session Marked as Complete
* Session Start Date
* Session End Date
* Cancel Session
* Session Changed
* Prerequisite is Due

Sample Email Configuration

The following is a sample configuration for the Message field when including the SCHEDULES.HTML tag for ILT virtual sessions:

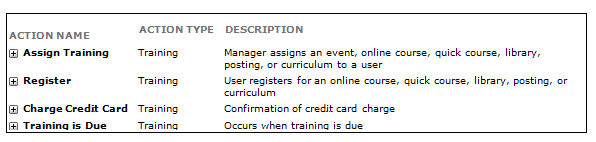


LMS Emails

Launch LO (Learning Object) Email Tag

An Email Tag is available for all relevant email actions that enable a user to launch a training item via a link in an email. When a user receives an email with this tag, the user is able to select the Launch Training link. The selection will open a window where the user is prompted to log-in to the application. After validating their ID in the application, the user may see the Transcript page (Depending on the Learning Object type), or the Details page (Depending on the Learning Object type), or the Learning Object will be launched (Depending on the Learning Object type.) If the user is already logged in to the application the LO will skip the ID validation and open the training. If the user is not registered for the training, the user will not launch the training but will navigate to the Transcript Page.

The following email triggers contain the tag for launching LO link:



Workflow

If the user is already logged in, then the landing page/login page automatically authenticates the user, and the user would skip the login page, and experience the auto launch. If the training is any status prior to registered, the user will always be navigated to the Transcript view.

| Learning Type | User is redirected to... |
| --- | --- |
| Test | Instruction page of test |
| Online Course or Quick Course | Transcript page and new window will open |
| Library | Details page of library |
| Curriculum | Details page. If curriculum player is active for the curriculum, the Curriculum Player will be the users view instead of the Details page. |
| Material | Transcript page. If Material is URL, auto launch will occur. |
| Session | Session details page. If the session does not have pre or post work, then a Manage link does not appear in the transcript options column. If there is no Manage link in the option column then the Launch LO link will take the user to the transcript page, instead of the session details page |

Deep Linking Email Tags

The LAUNCH.TRAINING and TRANSCRIPT.LINK email tags support SSO functionality. When included in an email, the LAUNCH.TRAINING tag allows recipients to launch training directly from the email. The TRANSCRIPT.LINK tag opens the Transcript page for the associated training.

The links for the LAUNCH.TRAINING and TRANSCRIPT.LINK tags attempt to authenticate the user through SSO and launch the training or open the Transcript page, respectively, without requiring the user to log in to the portal.

The links are formatted as follows:

* LAUNCH.TRAINING - Base URL + Launch Link + Learning Object ID
* TRANSCRIPT.LINK - Base URL + Transcript Link
  + If a base URL has been set for a specific user, that base URL is used when formatting the TRANSCRIPT.LINK tag.
  + If a base URL has not been set for a specific user, then the base URL set via the backend setting for the portal is used when formatting TRANSCRIPT.LINK tag.
  + If a base URL has not been set for a specific user and a base URL is not set via the backend setting, then the TRANSCRIPT.LINK tag will have an empty base URL. In this case, you can contact Global Customer Support to have the base URL configured via the backend setting, or you can enter the base URL for the users that are receiving and sending the emails.

Note: It is important to note that the links expose the portal's base SSO URL in the email, as configured in Admin > Catalog > Deep Linking.

This functionality is controlled by a backend setting that is turned off by default. To enable the setting for your portal, contact Global Customer Support. Note: Learning Management System and SSO integration must also be enabled in your portal. For portals that do not have SSO integration, recipients must log in to the portal before being directed to the training or Training Details page.

SF-182 Emails

The following tags are available in addition to the standard Trainee, Training field, and User Record tags. Note: The APPROVAL.STEP.NUMBER tag is only available for the SF-182 Form Approval Step Response and SF-182 Form Denied emails.

| Email Tag Name | Description |
| --- | --- |
| APPROVAL.STEP.NUMBER | Number of the approval step |
| SF.COURSE.NUMBER.CODE | Course Number Code |
| SF.DIRECT.BOOKS.AND.MATERIALS.COSTS | Direct Books and Materials Costs |
| SF.DIRECT.BOOKS.AND.MATERIALS.COSTS.FUND | Direct Books and Materials Costs Fund |
| SF.DIRECT.TOTAL.COST | Direct Total Cost |
| SF.DIRECT.TOTAL.COST.FUND | Direct Total Cost Fund |
| SF.DIRECT.TRAINING.TUITION.AND.FEES.COST | Direct Training Tuition and Fees Cost |
| SF.DIRECT.TRAINING.TUITION.AND.FEES.COST.FUND | Direct Training Tuition and Fees Cost Fund |
| SF.INDIRECT.TOTAL.COST | Indirect Total Cost |
| SF.INDIRECT.TOTAL.COST.FUND | Indirect Total Cost Fund |
| SF.INDIRECT.TRAINING.PER.DIEM.COST | Indirect Training Per Diem Cost |
| SF.INDIRECT.TRAINING.PER.DIEM.COST.FUND | Indirect Training Per Diem Cost Fund |
| SF.INDIRECT.TRAINING.TRAVEL.COST | Indirect Training Travel Cost |
| SF.INDIRECT.TRAINING.TRAVEL.COST.FUND | Indirect Training Travel Cost Fund |
| SF.TRAINING.DUTY.HOURS | Training Duty Hours |
| SF.TRAINING.END.DATE | Training End Date |
| SF.TRAINING.LOCATION.MAILING.ADDRESS.1 | Training Location Mailing Address 1 |
| SF.TRAINING.LOCATION.MAILING.ADDRESS.2 | Training Location Mailing Address 2 |
| SF.TRAINING.LOCATION.MAILING.CITY | Training Location Mailing City |
| SF.TRAINING.LOCATION.MAILING.STATE | Training Location Mailing State |
| SF.TRAINING.LOCATION.MAILING.ZIP.CODE | Training Location Mailing Zip Code |
| SF.TRAINING.NON.DUTY.HOURS | Training Non Duty Hours |
| SF.TRAINING.OBJECTIVES | Training Objectives |
| SF.TRAINING.START.DATE | Training Start Date |
| SF.VENDOR.E-MAIL.ADDRESS | Vendor E-mail Address |
| SF.VENDOR.MAILING.ADDRESS.1 | Vendor Mailing Address 1 |
| SF.VENDOR.MAILING.ADDRESS.2 | Vendor Mailing Address 2 |
| SF.VENDOR.MAILING.CITY | Vendor Mailing City |
| SF.VENDOR.MAILING.STATE | Vendor Mailing State |
| SF.VENDOR.MAILING.ZIP.CODE | Vendor Mailing Zip Code |
| SF.VENDOR.NAME | Vendor Name |
| SF.VENDOR.TELEPHONE.NUMBER | Vendor Telephone Number |

Training Deactivation Email

The following tags are available for Training Deactivation emails:

| Tag Name | Description |
| --- | --- |
| DEACTIVATION.DATE | Date training is set to deactivate. |
| RECIPIENT.DIVISION | Recipient’s division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone number. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's user name. |
| TITLE | Name of the training item. |
| VERSION | Version number of the training. |

Training Is Available Email

The following email tags are available for the Training Is Available email trigger:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date on which the action took place that triggers the email. |
| ASSIGNOR.FIRST.NAME | Assignor's first name. |
| AVAILABLE.DATE | Date on which the training is available to start.  This tag is available for the following additional email triggers:   * Approve Training Request * Assign Training * Register * Training is Due * Training Removed from Transcript * Transcript Status Edited * Transcript Updated   Note: This tag is only available for users with permission to manage the available date setting for a learning assignment. |
| ASSIGNOR.LAST.NAME | Assignor's last name. |
| ASSIGNOR.PHONE | Assignor's phone number. |
| AVAILABLE.DATE | Date on which training is available to start. |
| CC.APPROVER.FIRST.NAME | Cost center approver's first name. |
| CC.APPROVER.LAST.NAME | Cost center approver's last name. |
| CC.OWNER.FIRST.NAME | Cost center owner's first name. |
| CC.OWNER.LAST.NAME | Cost center owner's last name. |
| CREDITS | Training credits. |
| DUE.DATE | Training due date. |
| DURATION | Training hours. |
| LAUNCH.TRAINING | Link to launch the training. |
| MANAGER.FIRST.NAME | Manager's first name. |
| MANAGER.LAST.NAME | Manager's last name. |
| MANAGER.PHONE | Manager's phone number. |
| PRICE | Price of training. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| RECIPIENT.USERNAME | Recipient's username. |
| TITLE | Name of the training. |
| TRAINEE.DIVISION | Division name. |
| TRAINEE.FIRST.NAME | Student's first name. |
| TRAINEE.LAST.NAME | Student's last name. |
| TRAINEE.PHONE | Student's phone number. |
| TRAINEE.POSITION | Student's position title. |
| TRAINING.CATEGORY | Training category. |
| TRAINING.DESCRIPTION | Training description. |
| TRAINING.NUMBER | Session or online class number. For sessions, this displays the Session ID. If a Session ID is not set for the session, then this is blank. |
| TRAINING.PURPOSE | Training purpose. |
| TRAINING.STATUS | Status of the training, such as Assigned, Approved, Registered, etc. |
| TRAINING.TYPE | Type of training, such as Online Class, Event, etc. |
| TRANSCRIPT.LINK | Transcript page URL. |
| VENDOR.NAME | Name of training vendor. |

Login Message Emails

Login Message Emails

The following email tags are available for all Login Message Emails:

| Tag Name | Description |
| --- | --- |
| LOGIN.MESSAGE.ACTION | The on-click action selected for the action button to which the email is associated. |
| LOGIN.MESSAGE.TEXT | The HTML for a login message. |
| RECIPIENT.DIVISION | The recipient's division. |
| RECIPIENT.FIRST.NAME | The recipient's first name. |
| RECIPIENT.LAST.NAME | The recipient's last name. |
| RECIPIENT.PHONE | The recipient's phone number. |
| RECIPIENT.POSITION | The recipient's position. |
| RECIPIENT.USERNAME | The recipient's username. |
| USER.DIVISION | The user's division. |
| USER.FIRST.NAME | The user's first name. |
| USER.LAST.NAME | The user's last name. |

Planning Emails

Planning Emails Tags

Notes:

* When the email is sent to a planner of a "parent" plan as it relates to one of its subplans, the email tags refer to the subplan and not the parent plan.
* The BCC notifications to field is not currently supported.
* Users who are added to the Send To and Cc fields will not receive emails if they are not Work Force Planning users (i.e., Plan Owner, Primary Planner, Sub-Planner).

The following email tags are available:

| Tag Name | Description | tag availability |
| --- | --- | --- |
| WFP.AREA.TAG | WFP Area | All email triggers |
| WFP.COPLANNERS.TAG | WFP Co-Planners | Only the Plan CoPlanners Changed trigger |
| WFP.DUE.DATE.TAG | WFP Due Date | All email triggers except: Subplan Submitted, Subplan To Primary Planner, Subplan Rejected, and Subplan Accepted |
| WFP.PLAN.NAME.TAG | WFP Plan Name | All email triggers except Subplan Rejected and Subplan Accepted |
| WFP.PLANNER.NAME.TAG | WFP Planner Name | Only two triggers: Subplan Submitted and Subplan Accepted |
| WFP.PRIMARY.PLANNER.TAG | WFP Primary Planner | Only the Primary Planner Changed trigger |
| WFP.RECIPIENT.NAME.TAG | WFP Recipient Name | All email triggers |

Performance Emails

Development Plan Emails (Redesign)

The following tags are available for the redesigned Development Plans emails:

| Tag Name | Description |
| --- | --- |
| DEVPLAN.APPROVER.FIRST.NAME | Development Plan Approver First Name |
| DEVPLAN.APPROVER.LAST.NAME | Development Plan Approver Last Name |
| DEVPLAN.LINK | Link to the development plan |
| DEVPLAN.TITLE | Title of the development plan |
| DEVPLAN.USER.FIRST.NAME | Development Plan User's First Name |
| DEVPLAN.USER.LAST.NAME | Development Plan User's Last Name |
| USER.FIRST.NAME | Email Recipient's First Name |
| USER.LAST.NAME | Email Recipient's Last Name |

Recruiting Emails

Applicant Forms

The following tags are available for the Assign Applicant Form and Applicant Form Complete emails, in addition to custom fields defined by the administrator in Requisition and Applicant Preferences:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| COMPANY.NAME | Name of the company. |
| FORM .APPLICANT.DATE.ASSIGNED | Date the form was assigned to the applicant. |
| FORM .DESCRIPTION | Description of the form. Note: This tag is not available for the Applicant Form Complete email. |
| FORM.TITLE | Title of the form. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.COMPENSATION.CURRENCY.SYMBOL | Currency type defined for the job requisition. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.TYPE | Compensation type defined for the job requisition. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.OU.DIVISION.TITLE | Division selected for the requisition. |
| JOB.OU.GRADE.TITLE | Grade selected for the requisition. |
| JOB.OU.LOCATION.ADDRESS | Facility Address defined for the location defined on the job requisition. |
| JOB.OU.LOCATION.TITLE | Location selected for the requisition. |
| JOB.REQUISITION.HIRING.MANAGER.LIST.HTML | User(s) listed as the Hiring Manager(s) for an organizational unit (OU) (in HTML format). |
| JOB.REQUISITION.HIRING.MANAGER.LIST.TEXT | User(s) listed as the Hiring Manager(s) for an OU (in text format). |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Applicant Review Feedback Received

The following email tags are available for the Applicant Review Feedback Received email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.OU.DIVISION.TITLE | Division selected for the requisition. |
| JOB.OU.GRADE.TITLE | Grade selected for the requisition. |
| JOB.OU.LOCATION.ADDRESS | Facility Address defined for the location defined on the job requisition. |
| JOB.OU.LOCATION.TITLE | Location selected for the requisition. |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| REVIEW.FEEDBACK.SUMMARY | Displays all feedback for applicants that have been reviewed from the review applicants resume carousel for a particular requisition. First Column: Applicant Name Second Column: Applicant Email Address Feedback: Yes/No (depending on decision) |
| USER.SUBMITTING.FEEDBACK.FIRST.NAME | First name of user submitting feedback for the applicant. |
| USER.SUBMITTING.FEEDBACK.LAST.NAME | Last name of user submitting feedback for the applicant. |

Applicant Status Change

The following tags are available for the Applicant Status Change email:

Note: In addition to the tags below, all custom email tags can be used for the Applicant Status Change email.

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.COMMENT.ALL.LIST.HTML | Displays all applicant comments with the name of the user who posted the comment (in HTML format). |
| APPLICANT.COMMENT.ALL.LIST.TEXT | Displays all applicant comments with the name of the user who posted the comment (in text format). |
| APPLICANT.RATING.ALL.LIST.HTML | Displays all applicant ratings with the name of the user who posted the rating (in HTML format). |
| APPLICANT.RATING.ALL.LIST.TEXT | Displays all applicant ratings with the name of the user who posted the rating (in text format). |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.OU.LOCATION.TITLE | Location Organizational Unit (OU) of the requisition. |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.REQUISITION.HIRING.MANAGER.NAME.FULL | Hiring manager's full name for the requisition. |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. |
| PROFILE.USER.ADDRESS.1 | Line 1 of the candidate's physical address. |
| PROFILE.USER.ADDRESS.2 | Line 2 of the candidate's physical address, which can include additional address information such as an apartment or suite number. |
| PROFILE.USER.CITY | The candidate's city from their physical address. |
| PROFILE.USER.COUNTRY | The candidate's country from their physical address. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.POSTAL CODE | The candidate's ZIP code or postal code from their address. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| PROFILE.USER.STATE | The candidate's state from their physical address. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Assessment Assigned and SHL Assessment Complete

The following tags are available for the Assessment Assigned and SHL Assessment Complete emails:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.COMPENSATION.CURRENCY.SYMBOL | Currency type defined for the job requisition. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.TYPE | Compensation type defined for the job requisition. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the job requisition. |
| JOB.OU.DIVISION.TITLE | Division selected for the requisition. |
| JOB.OU.GRADE.TITLE | Grade selected for the requisition. |
| JOB.OU.LOCATION.ADDRESS | Facility Address defined for the location defined on the job requisition. |
| JOB.OU.LOCATION.TITLE | Location selected for the requisition. |
| JOB.REQUISITION.HIRING.MANAGER.LIST.HTML | User(s) listed as the Hiring Manager(s) for an organizational unit (OU) (in HTML format). |
| JOB.REQUISITION.HIRING.MANAGER.LIST.TEXT | User(s) listed as the Hiring Manager(s) for an OU (in text format). |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. |
| PROFILE.USER.ADDRESS.1 | Line 1 of the candidate's physical address. |
| PROFILE.USER.ADDRESS.2 | Line 2 of the candidate's physical address, which can include additional address information such as an apartment or suite number. |
| PROFILE.USER.CITY | The candidate's city from their physical address. |
| PROFILE.USER.COUNTRY | The candidate's country from their physical address. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.POSTAL CODE | The candidate's ZIP code or postal code from their address. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| PROFILE.USER.STATE | The candidate's state from their physical address. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Assign Integration Assessment

The following email tags are available for the Assign Integration Assessment email:

| tag name | tag description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.INTEGRATION.ASSESSMENT.LINK | Displays link to the assigned integration assessment for the applicant. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Displays the internal or external job ad, depending on the recipient. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.COMPENSATION.CURRENCY.SYMBOL | Currency type defined for the job requisition. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.TYPE | Compensation type defined for the job requisition. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.OU.DIVISION.TITLE | Division selected for the requisition. |
| JOB.OU.GRADE.TITLE | Grade selected for the requisition. |
| JOB.OU.LOCATION.ADDRESS | Facility Address defined for the location defined on the job requisition. |
| JOB.OU.LOCATION.TITLE | Location selected for the requisition. |
| JOB.REQUISITION.HIRING.MANAGER.LIST.HTML | User(s) listed as the Hiring Manager(s) for an organizational unit (OU) (in HTML format). |
| JOB.REQUISITION.HIRING.MANAGER.LIST.TEXT | User(s) listed as the Hiring Manager(s) for an OU (in text format). |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. |
| PROFILE.USER.ADDRESS.1 | Line 1 of the candidate's physical address. |
| PROFILE.USER.ADDRESS.2 | Line 2 of the candidate's physical address, which can include additional address information such as an apartment or suite number. |
| PROFILE.USER.CITY | The candidate's city from their physical address. |
| PROFILE.USER.COUNTRY | The candidate's country from their physical address. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.POSTAL CODE | The candidate's ZIP code or postal code from their address. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the |
| PROFILE.USER.STATE | The candidate's state from their physical address. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Background Check Assigned and Background Check Complete Emails

The following email tags are available for both the Background Check Assigned and Background Check Complete email, unless otherwise noted in the email trigger description:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| BACKGROUND.CHECK.LINK | Link to complete background check. |
| BACKGROUND.CHECK.DATE.ASSIGNED | Date on which the background check is assigned. |
| BACKGROUND.CHECK.DETAILS | Details of the background check. Note: This tag is only available for the Background Check Complete email. |
| BACKGROUND.CHECK.PROGRESS | Progress of the background check. Note: This tag is only available for the Background Check Complete email. |
| BACKGROUND.CHECK.RESULT | Result of the background check. Note: This tag is only available for the Background Check Complete email. |
| BACKGROUND.CHECK.STATUS | Status of the background check. Note: This tag is only available for the Background Check Complete email. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.REQUISITION.HIRING.MANAGER.NAME.FULL | Hiring manager's full name for the requisition. |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. Note: This tag is only available for the Interview Scheduling Notification – Applicant and OnDemand Video Interview Assigned emails. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Connect With Us

The following tags are available for all Connect With Us email trigger:

| Tag Name | Description |
| --- | --- |
| COMPANY.NAME | Name of the company. |
| PASSWORD.RESET.URL | Provides link to reset password. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| TODAY'S.DATE | Displays the current date. |

Integration Assessment Completed

The following email tags are available for the Integration Assessment Completed email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Displays the internal or external job ad, depending on the recipient. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.COMPENSATION.CURRENCY.SYMBOL | Currency type defined for the job requisition. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.TYPE | Compensation type defined for the job requisition. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.OU.DIVISION.TITLE | Division selected for the requisition. |
| JOB.OU.GRADE.TITLE | Grade selected for the requisition. |
| JOB.OU.LOCATION.ADDRESS | Facility Address defined for the location defined on the job requisition. |
| JOB.OU.LOCATION.TITLE | Location selected for the requisition. |
| JOB.REQUISITION.HIRING.MANAGER.LIST.HTML | User(s) listed as the Hiring Manager(s) for an organizational unit (OU) (in HTML format). |
| JOB.REQUISITION.HIRING.MANAGER.LIST.TEXT | User(s) listed as the Hiring Manager(s) for an OU (in text format). |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. |
| PROFILE.USER.ADDRESS.1 | Line 1 of the candidate's physical address. |
| PROFILE.USER.ADDRESS.2 | Line 2 of the candidate's physical address, which can include additional address information such as an apartment or suite number. |
| PROFILE.USER.CITY | The candidate's city from their physical address. |
| PROFILE.USER.COUNTRY | The candidate's country from their physical address. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.POSTAL CODE | The candidate's ZIP code or postal code from their address. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| PROFILE.USER.STATE | The candidate's state from their physical address. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Interview Management Emails

The following tags are available for all Interview Management email triggers, unless otherwise noted in the email tag description:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.COVER.LETTER | Applicant's cover letter. Note: The cover letter displays as an email attachment when this tag is used in an email. In addition, this tag is only available for the Interview Cancelled Notification, Interview Scheduling Notification - Interviewer(s), and Interview Scheduling Response emails. |
| APPLICANT.RESUME.CV | Applicant's resume/CV. Note: The resume/CV displays as an email attachment when this tag is used in an email. |
| APPLICANT.SCHEDULE.SUMMARY | Displays all interview sessions scheduled for the applicant. Displays the following summary information for each interview:   * Interview date * Applicant name * Job display name of requisition * Additional interviewers, or "None" if there are no additional interviewers * Interview time zone * Interview start time * Interview end time * Interview type   + In Person   + Phone   + Live Video - (Note: This applies to both Live Video interviews and On Demand Video interviews.)   + Virtual * Interview location   + In Person - Physical location of interview   + Phone - Phone number for interview   + Live Video - Link to launch interview session (Note: This applies to both Live Video interviews and On Demand Video interviews.)   + Virtual * Interviewers - This field displays the interviewers for the interview, as well as their Position OU. This field only displays if interviewers are defined for the interview. An additional tag is not needed for this information to display.   If multiple interview sessions are defined for the applicant, then each session displays in order of soonest to latest interview.  Note: This tag is only available for the Interview Scheduling Notification – Applicant email. |
| APPLICANT.SCHEDULE.SUMMARY.NO.JOB.TITLE | When included, the message does not display the job title of any of the interviewers but still includes the interview details. This allows recruiters to provide their applicants all the necessary information about the interview without displaying sensitive data about the interviewers.  Note: This tag is only available for the Interview Scheduling Notification – Applicant email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| COMMENTS.TO.APPLICANT | Comments defined by the interview scheduler to the applicant. Note: This tag is only available for the Interview Scheduling Notification – Applicant and OnDemand Video Interview Assigned emails. |
| COMMENTS.TO.INTERVIEWER | Comments defined by the interview scheduler to the interviewer. Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Scheduling Notification – Interviewer(s), Interview Scheduling Response, OnDemand Video Interview Assigned, and OnDemand Video Interview Completed emails. |
| DAILY.APPLICANT.SCHEDULE.SUMMARY | Displays all interviews scheduled for an applicant for the date on which the email trigger is fired. Displays the following summary information for each interview:   * Interview date * Interview time zone * Interview start time * Interview end time * Interview type   + In Person   + Phone   + Live Video - (Note: This applies to both Live Video interviews and On Demand Video interviews.)   + Virtual * Interview location   + In Person - Physical location of interview   + Phone - Phone number for interview   + Live Video - Link to launch interview session (Note: This only applies to Live Video interviews and not On Demand Video interviews.)   + Virtual * Interviewers - This field displays the interviewers for the interview, as well as their Position OU. This field only displays if interviewers are defined for the interview. An additional tag is not needed for this information to display.   Note: This tag is only available for the Today’s Scheduled Interviews email. |
| DAILY.INTERVIEWER.SCHEDULE.SUMMARY | Displays all interviews scheduled for a user for the date on which the email trigger is fired. Displays the following summary information for each interview:   * Interview date * Applicant name * Job display name of requisition * Other interviewers, or "None" if there are no other interviewers * Interview time zone * Interview start time * Interview end time * Interview type   + In Person   + Phone   + Live Video - (Note: This applies to both Live Video interviews and On Demand Video interviews.)   + Virtual * Interview location   + In Person - Physical location of interview   + Phone - Phone number for interview   + Live Video - Link to launch interview session (Note: This only applies to Live Video interviews and not On Demand Video interviews.)   + Virtual   Note: This tag is only available for the Today’s Scheduled Interviews email. |
| INTERVIEW.DATE | Date specified for the interview session. Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| INTERVIEW.END.TIME | End time specified for the interview session. Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| INTERVIEWER.FULL.NAME | Full name of the interviewer who recorded the interview scheduling response. Note: This tag is only available for the Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| INTERVIEWER.POSITION.TITLE | Position OU of the interviewer who recorded the interview scheduling response. Note: This tag is only available for the Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| INTERVIEWER.RECOMMENDATION | Displays the recommendation, either Advance or Do not Advance, recorded by the interviewer for the applicant. Note: This tag is only available for the Interview Recommendation Recorded email. |
| INTERVIEWER.RECOMMENDATION.DATE | Displays the date on which the recommendation, either Advance or Do not Advance, was recorded by the interviewer for the applicant. Note: This tag is only available for the Interview Recommendation Recorded email. |
| INTERVIEWER.RECOMMENDATIONS.SUMMARY | Displays a summary of all recommendations for an applicant, either Advance or Do not Advance, that have been submitted up to the time the email is triggered.  Displays the following summary information:   * Interviewer name * Interviewer Position OU * Interviewer recommendation, either Advance or Do not Advance   Note: This tag is only available for the Interview Recommendation Recorded email. |
| INTERVIEWER.SCHEDULE.SUMMARY | Displays all interview sessions being scheduled for the interviewer. Displays the following summary information for each interview:   * Interview date * Applicant name * Job display name of requisition * Additional interviewers, or "None" if no additional interviewers * Interview time zone * Interview start time * Interview end time * Interview type   + In Person   + Phone   + Live Video - (Note: This applies to both Live Video interviews and On Demand Video interviews.)   + Virtual * Interview location   + In Person - Physical location of interview   + Phone - Phone number for interview   + Live Video - Link to launch interview session (Note: This only applies to Live Video interviews and not On Demand Video interviews.)   + Virtual   Note: This tag is only available for the Interview Scheduling Notification – Interviewer(s) email. |
| INTERVIEW.GUIDE | Interview guide for the interviewer. Note: The interview guide displays as an email attachment when this tag is used in an email. For portals with multiple languages enabled, the guide displays in the recipient's language, if available. If the recipient's language is not available, then the guide displays in the sender's language. In addition, this tag is only available for the Interview Scheduling Notification - Interviewer(s) and Interview Scheduling Response emails. |
| INTERVIEW.GUIDE.COMMENTS | Displays the comments written by the interviewer in the Record Recommendation section of the interview guide. If the interviewer did not provide comments, then "No Comments" displays in place of the tag. Note: This tag is only available for the Interview Recommendation Recorded email. |
| INTERVIEW.LOCATION.ADDRESS | Displays the address associated with the location of the interview session, if defined by the interview scheduler. Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| INTERVIEW.LOCATION.PHONE.NUMBER.LIVE.VIDEO | Displays the location, phone number, or live video link specified for the interview session.  Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| INTERVIEW.MANAGER.LINK | Deep link to the Interview Manager page for the interviewer. Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, Interview Scheduling Notification – Interviewer(s), OnDemand Video Interview Completed, and Today’s Scheduled Interviews emails. |
| INTERVIEW.REQUEST.RESPONSE | Response that the interviewer provided in response to the Outlook Meeting Invite for the interview. The response value is either Scheduled or Decline. Note: This tag is only available for the Interview Scheduling Response email. |
| INTERVIEW.START.TIME | Start time specified for the interview session. Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| INTERVIEW.TIME.ZONE | Time zone specified for the interview session. Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| INTERVIEW.TYPE | Type of interview session, either In Person, Phone, or Live Video. Note: This tag is only available for the Interview Cancelled Notification, Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and Interview Scheduling Response emails. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.REQUISITION.HIRING.MANAGER.NAME.FULL | Hiring manager's full name for the requisition. |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| LIVE.VIDEO.INTERVIEW.REVIEW.LINK | Displays a link to launch the video interview for review in HireVue. The unique link is defined by HireVue for each completed live video interview. This tag only applies to Live Video interview types and does not apply to On Demand Video interview types. Note: This tag is only available for the Interview Recommendation Nudge, Interview Recommendation Pending, and Interview Recommendation Recorded emails. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. Note: This tag is only available for the Interview Scheduling Notification – Applicant and OnDemand Video Interview Assigned emails. |
| ON.DEMAND.VIDEO.INTERVIEW.ASSIGNMENT.LINK | Displays a link to launch the assigned On Demand Video interview in HireVue. Clicking the link takes the recipient to HireVue to complete the On Demand Video interview. Note: This tag is only available for the OnDemand Video Interview Assigned email. |
| ON.DEMAND.VIDEO.INTERVIEW.REVIEW.LINK | Displays a link to launch and review the On Demand Video interview in HireVue. The unique link is defined by HireVue for each completed On Demand Video interview. Note: This tag is only available for the Interview Recommendation Nudge, Interview Recommendation Pending, Interview Recommendation Recorded, and OnDemand Video Interview Completed emails. |
| ON.DEMAND.VIDEO.INTERVIEW.SCORE | Displays the On Demand Video interview review score recorded in HireVue for the On Demand Video interview. The unique link is defined by HireVue for each completed On Demand Video interview. Note: This tag is only available for the Interview Recommendation Recorded email. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| VIDEO.INTERVIEW.REVIEWER.FULL.NAME.LIST | Full name of all video interview reviewers. Note: This tag is only available for the OnDemand Video Interview Assigned and OnDemand Video Interview Completed emails. |

Job Alert Email

The following email tags are available for the Job Alert email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| ALERT.RESULT.LINKS | Displays links to one or more job postings that match the user’s job alert criteria. The link opens the internal or external requisition posting, depending on the recipient of the Job Alert email.  The tag only needs to be used once in the email.  For external recipients, if there are multiple matching job postings, then each job posting displays as a separate link. A maximum of 20 links display. If there are more than 20 matching job postings, then "More job opportunities available at the Career Site" displays as a link at the bottom of the list. Clicking the link opens the organization's default career site. |
| JOB.ALERT.EXPIRATION | Date on which the job alert expires. |
| JOB.ALERT.FREQUENCY | Frequency with which the job alert is sent, either immediately, daily, or weekly. |
| JOB.ALERT.TITLE | Title of job alert. Note: This tag is only available for external recipients. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. Note: This tag is only available for the Interview Scheduling Notification – Applicant and OnDemand Video Interview Assigned emails. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |

Merged Duplicate Applicants

The following tags are available for the Merged Duplicate Applicants email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICATION.DATE | Date the application was submitted. |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.TITLE | Job title defined on the requisition form. |
| MERGED.USER.FIRST.LAST | Name of merged applicant whose application has been moved to the target profile. |
| MY.PROFILE.LINK.TARGET | Link to target applicant's My Profile page. |
| TARGET.USER.FIRST.LAST | First and last name of the user with whom the applicant is merged. |
| TARGET.USER.PROFILE.LINK | This displays a link to the target user's Applicant Profile page. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |

Notify Applicant Prior to Archiving

The following tags are available (new tags display in red):

| Tag Name | Description |
| --- | --- |
| MY.PROFILE.LINK | Link to applicant's My Profile page. |
| NUMBER.DAYS | Number of days before archiving applicant’s data. |
| PASSWORD.RESET.URL | The link for the applicant to reset their password. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.PREFIX | Displays the prefix field associated with an applicant’s profile. |

OFCCP Emails

The following tags are available for all Office of Federal Contract Compliance Programs (OFCCP) email triggers (Invite to Apply and Voluntary Withdrawal), unless otherwise noted in the email trigger description:

The following tags are available for all offer letter management email triggers, unless otherwise noted in the email trigger description (new tags appear in red):

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| INVITATION.LINK | Link to the Job Details page for all requisitions selected for the invitation. Note: This tag is only available for the Invite to Apply email trigger. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.REQUISITION.HIRING.MANAGER.NAME.FULL | Hiring manager's full name for the requisition. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to the user's My Profile page. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Offer Letter Management Emails

The following tags are available for all offer letter management email triggers, unless otherwise noted in the email trigger description:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. The value appears in alphanumeric format in the offer letter. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. The value appears in alphanumeric format in the offer letter. |
| APPLICATION.DATE | Date the application was submitted. The value appears in alphanumeric format in the offer letter. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. The value appears in alphanumeric format in the offer letter. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. The value appears in alphanumeric format in the offer letter. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined for the job requisition in HTML format. |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined for the job requisition in text format. |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the job requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. The value appears in alphanumeric format in the offer letter. |
| JOB.REQUISITION.HIRING.MANAGER.NAME.FULL | Hiring manager's full name for the requisition. |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. Note: This tag applies to the Offer Approval Decision and Offer Pending Approval email triggers. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. The value appears in alphanumeric format in the offer letter. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to the user's My Profile page. |
| OFFER.APPROVAL.COMMENT | Approval comment. Note: This tag is only available for the Approval Decision email trigger. |
| OFFER.APPROVAL.DECISION | Approval decision. Note: This tag is only available for the Approval Decision email trigger. |
| OFFER.APPROVALS.LINK | Link to the requisition Offer Pending Approvals page. Note: This tag is only available for the Pending Approval Notification and Pending Approval Reminder email triggers. |
| OFFER.APPROVER.FULL.NAME | Full name of the offer approver. Note: This tag is only available for the Approval Decision email trigger. |
| OFFER.BONUS | Bonus defined for the current offer. The value appears in alphanumeric format in the offer letter. |
| OFFER.COMPENSATION.TYPE | Compensation type defined for the current offer. |
| OFFER.CURRENCY.SYMBOL | Currency symbol defined for the current offer. |
| OFFER.DATE | Date the current offer was created. The value appears in alphanumeric format in the offer letter. |
| OFFER.HIRING.MANAGER.NAME.FULL | Full name of the hiring manager defined for the current offer. |
| OFFER.DIVISION | Division defined for the current offer. |
| OFFER.HOURLY.RATE | Hourly rate defined for the current offer. The value appears in alphanumeric format in the offer letter. |
| OFFER.NEXT.LEVEL.HIRING.MANAGER.NAME.FULL | Full name of the next level hiring manager defined for the current offer. |
| OFFER.LABOR.HOURS | Labor hours defined for the current offer. The value appears in alphanumeric format in the offer letter. |
| OFFER.LOCATION | Location defined for the current offer. |
| OFFER.NOTES | Notes defined for the current offer. |
| OFFER.PAY.CYCLE | Pay cycle defined for the current offer. The value appears in alphanumeric format in the offer letter. |
| OFFER.RESPONSE.DATE | Offer response date recorded for the candidate. Note: This tag is only available for the Candidate Response Received and Candidate Hired email triggers. |
| OFFER.RESPONSE.DECISION | Offer response decision recorded for the candidate. Note: This tag is only available for the Candidate Response Received and Candidate Hired email triggers. |
| OFFER.RESPONSE.DECLINE.REASON | Offer response decline reason recorded for the candidate. Note: This tag is only available for the Candidate Response Received and Candidate Hired email triggers. |
| OFFER.RESPONSE.NOTES | Offer response notes recorded for the candidate. Note: This tag is only available for the Candidate Response Received and Candidate Hired email triggers. |
| OFFER.SALARY | Salary defined for the current offer. The value appears in alphanumeric format in the offer letter. |
| OFFER.SEND.INSTRUCTIONS | Instructions added when sending to the offer to the candidate. Note: This tag is only available for the Email Offer to Candidate and Send Offer to Candidate Profile email triggers. |
| OFFER.START.DATE | Start date defined for the current offer. The value appears in alphanumeric format in the offer letter. |
| OFFER.WAGE.TYPE | Wage type defined for the current offer. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. The value appears in alphanumeric format in the offer letter. |
| RECIPIENT.POSITION | Recipient's position. |

Onboarding Notifications Email

The following email tags are available for the Onboarding Notifications email trigger:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.REQUISITION.HIRING.MANAGER.NAME.FULL | Hiring manager's full name for the requisition. |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. Note: This tag is only available for the Interview Scheduling Notification – Applicant and OnDemand Video Interview Assigned emails. |
| OFFER.BONUS | Bonus defined for the current offer. |
| OFFER.COMPENSATION.TYPE | Compensation type defined for the current offer. |
| OFFER.CURRENCY.SYMBOL | Currency symbol defined for the current offer. |
| OFFER.DATE | Date the current offer was created. |
| OFFER.HIRING.MANAGER.NAME.FULL | Full name of the hiring manager defined for the current offer. |
| OFFER.DIVISION | Division defined for the current offer. |
| OFFER.HOURLY.RATE | Hourly rate defined for the current offer. |
| OFFER.NEXT.LEVEL.HIRING.MANAGER.NAME.FULL | Full name of the next level hiring manager defined for the current offer. |
| OFFER.LABOR.HOURS | Labor hours defined for the current offer. |
| OFFER.LOCATION | Location defined for the current offer. |
| OFFER.NOTES | Notes defined for the current offer. |
| OFFER.PAY.CYCLE | Pay cycle defined for the current offer. |
| OFFER.SALARY | Salary defined for the current offer. |
| OFFER.START.DATE | Start date defined for the current offer. |
| OFFER.WAGE.TYPE | Wage type defined for the current offer. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Referral to External User Email

The following tags are available:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| CAREER.SITE.LINK | Link to career site for job referrals. |
| COMPANY.NAME | Name of the company. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.REQUISITION.HIRING.MANAGER.NAME.FULL | Hiring manager's full name for the requisition. |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | The full name of the primary owner of the requisition. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| REFERRER.FIRST.NAME | The first name of the user referring the job. The referrer's first name is entered in the Your First name field in the Send to a Friend pop-up when referring a job from the career site. |
| REFERRER.LAST.NAME | The last name of the user referring the job. The referrer's last name is entered in the Your Last Name field in the Send to a Friend pop-up when referring a job from the career site. |

Reference Letter Form Complete

The following tags are available for the Reference Letter Form Complete email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| COMPANY.NAME | Name of the company. |
| FORM.COMPLETED.DATE | The date the form was completed by the referrer. |
| FORM .DESCRIPTION | Description of the form. |
| FORM.TITLE | Title of the form. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.COMPENSATION.CURRENCY.SYMBOL | Currency type defined for the job requisition. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.TYPE | Compensation type defined for the job requisition. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.OU.DIVISION.TITLE | Division selected for the requisition. |
| JOB.OU.GRADE.TITLE | Grade selected for the requisition. |
| JOB.OU.LOCATION.ADDRESS | Facility Address defined for the location defined on the job requisition. |
| JOB.OU.LOCATION.TITLE | Location selected for the requisition. |
| JOB.REQUISITION.HIRING.MANAGER.LIST.HTML | User(s) listed as the Hiring Manager(s) for an organizational unit (OU) (in HTML format). |
| JOB.REQUISITION.HIRING.MANAGER.LIST.TEXT | User(s) listed as the Hiring Manager(s) for an OU (in text format). |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. |
| PROFILE.USER.ADDRESS.1 | Line 1 of the candidate's physical address. |
| PROFILE.USER.ADDRESS.2 | Line 2 of the candidate's physical address, which can include additional address information such as an apartment or suite number. |
| PROFILE.USER.CITY | The candidate's city from their physical address. |
| PROFILE.USER.COUNTRY | The candidate's country from their physical address. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.POSTAL CODE | The candidate's ZIP code or postal code from their address. |
| PROFILE.USER.STATE | The candidate's state from their physical address. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| TASK.DATE.ASSIGNED | Date the Reference Letter Request task was assigned to the applicant. |

Reference Letter Request

The following tags are available for the Reference Letter Request email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICATION.DATE | Date the application was submitted. |
| COMPANY.NAME | Name of the company. |
| FORM.DESCRIPTION | Description of the form. |
| FORM.LINK | Link that the referrer clicks in the email to launch the reference letter form. |
| FORM.TITLE | Title of the form. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OU.DIVISION.TITLE | Division selected for the requisition. |
| JOB.OU.GRADE.TITLE | Grade selected for the requisition. |
| JOB.OU.LOCATION.ADDRESS | Facility Address defined for the location defined on the job requisition. |
| JOB.OU.LOCATION.TITLE | Location selected for the requisition. |
| JOB.REQUISITION.ID | Requisition ID. |
| PROFILE.USER.ADDRESS.1 | Line 1 of the candidate's physical address. |
| PROFILE.USER.ADDRESS.2 | Line 2 of the candidate's physical address, which can include additional address information such as an apartment or suite number. |
| PROFILE.USER.CITY | The candidate's city from their physical address. |
| PROFILE.USER.COUNTRY | The candidate's country from their physical address. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.POSTAL CODE | The candidate's ZIP code or postal code from their address. |
| PROFILE.USER.STATE | The candidate's state from their physical address. |
| REFERENCE.FIRST.NAME | First name of the referrer. |
| REFERENCE.LAST.NAME | Last name of the referrer. |

Request Feedback

The following tags are available for the Request Feedback email:

| email Tag | description |
| --- | --- |
| COHORT.LINK | Displays as a link that opens the candidate review page |
| FEEDBACK.REQUESTOR | Name of user who requested feedback. |
| USER.SUBMITTING.FEEDBACK.FIRST.NAME | First name of user who submitted feedback. |
| USER.SUBMITTING.FEEDBACK.LAST.NAME | Last name of user who submitted feedback. |
| FEEDBACK.VOTE | Vote by feedback submitter to advance or not advance candidate. |
| FEEDBACK.COMMENTS | Comments by feedback submitter about candidate. |

Request References

The following tags are available for the Request References email:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| APPLICANT.STATUS | Applicant's status. |
| APPLICANT.STATUS.CHANGE.DATE | Most recent date on which the applicant's status changed. |
| APPLICATION.DATE | Date the application was submitted. |
| APPLICATION.REVIEW.LINK | Link to the Talent Profile page for a specific application. |
| COMPANY.NAME | Name of the company. |
| JOB.AD | Internal or external job ad, depending on the recipient. |
| JOB.COMPENSATION.CURRENCY.SYMBOL | Currency type defined for the job requisition. |
| JOB.COMPENSATION.RANGE.MAX | Payment maximum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.RANGE.MIN | Payment minimum range for the job. Note: This tag is only available to users who have permission to view and edit the salary range for requisitions. For users who do not have salary range permission, the tag is not visible in the tags pop-up. |
| JOB.COMPENSATION.TYPE | Compensation type defined for the job requisition. |
| JOB.DESCRIPTION | Internal or external job description, depending on the recipient. |
| JOB.DETAILS.LINK | Link to the specific Job Details page on which the requisition is located. |
| JOB.EMPLOYMENT.TYPE | Employment type defined on the requisition form. |
| JOB.IDEAL.QUALIFICATIONS.HTML | Ideal qualifications defined on the requisition form (in HTML format). |
| JOB.IDEAL.QUALIFICATIONS.TEXT | Ideal qualifications defined on the requisition form (in text format). |
| JOB.MINIMUM.QUALIFICATIONS | Minimum qualifications defined for the requisition. |
| JOB.OPENINGS.NUMBER | Number of openings defined on the requisition form. |
| JOB.OU.DIVISION.TITLE | Division selected for the requisition. |
| JOB.OU.GRADE.TITLE | Grade selected for the requisition. |
| JOB.OU.LOCATION.ADDRESS | Facility Address defined for the location defined on the job requisition. |
| JOB.OU.LOCATION.TITLE | Location selected for the requisition. |
| JOB.REQUISITION.HIRING.MANAGER.LIST.HTML | User(s) listed as the Hiring Manager(s) for an organizational unit (OU) (in HTML format). |
| JOB.REQUISITION.HIRING.MANAGER.LIST.TEXT | User(s) listed as the Hiring Manager(s) for an OU (in text format). |
| JOB.REQUISITION.ID | Requisition ID. |
| JOB.REQUISITION.OWNER.LIST.HTML | A list of the owners for the requisition (in HTML format). |
| JOB.REQUISITION.OWNER.LIST.TEXT | A list of the owners for the requisition (in text format). |
| JOB.REQUISITION.PRIMARY.OWNER.NAME.FULL | Displays the user defined in the Primary Owner field on the General tab when creating, editing, and copying requisition templates, default requisition templates, and job requisitions. |
| JOB.RESPONSIBILITIES.LIST.HTML | Job responsibilities defined for the position OU (in HTML format). |
| JOB.RESPONSIBILITIES.LIST.TEXT | Job responsibilities defined for the position OU (in text format). |
| JOB.TARGET.HIRE.DATE | Target hire date defined on the job requisition form. |
| JOB.TITLE | Job title defined on the requisition form. |
| MY.PROFILE.LINK | Link to applicant's My Profile page. |
| PROFILE.USER.ADDRESS.1 | Line 1 of the candidate's physical address. |
| PROFILE.USER.ADDRESS.2 | Line 2 of the candidate's physical address, which can include additional address information such as an apartment or suite number. |
| PROFILE.USER.CITY | The candidate's city from their physical address. |
| PROFILE.USER.COUNTRY | The candidate's country from their physical address. |
| PROFILE.USER.EMAIL | Email address associated with an applicant profile. |
| PROFILE.USER.NAME.FIRST | First name associated with an applicant profile. |
| PROFILE.USER.NAME.LAST | Last name associated with an applicant profile. |
| PROFILE.USER.PHONE | Phone number associated with an applicant profile. |
| PROFILE.USER.POSTAL CODE | The candidate's ZIP code or postal code from their address. |
| PROFILE.USER.PREFIX | This tag displays the prefix the applicant uses when addressing marital status. The prefix is defined in the Prefix field by applicants when completing their profile or by recruiters when defining the applicant's contact details in Manage Applicants. |
| PROFILE.USER.STATE | The candidate's state from their physical address. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |
| TASK.DATE.ASSIGNED | The date the task was assigned to the applicant. |

Requisition Request Emails

The following email tags are available for requisition request emails:

| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| PENDING.REQUEST.LINK | Displays link to pending Requisition Requests tab on the Manage Job Requisitions page. Note: This tag is only available for the Requisition Request Submitted email. |
| REQUESTER.FULL.NAME | Displays the full name of the user who submitted the request in the following format [First Name Last Name]. |
| REQUESTER.TITLE | Displays the position associated with the user who submitted the request. |
| REQUEST.POSITION.NAME | Displays the position selected for the requisition request. |
| REQUEST.RESPONSE | Displays the response to the request, either Declined or Accepted. Note: This tag is only available for the Requisition Request Response email. |
| REQUEST.SUBMITTED.DATE | Displays the date on which the request was submitted in [dd/mm/yyyy] format (unless defined differently for a different culture). |
| REQUISITION.REQUESTS.LINK | Displays link to the Requisition Request page. Note: This tag is only available for the Requisition Request Response email. |
| RECIPIENT.DIVISION | Recipient's division. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| RECIPIENT.PHONE | Recipient's phone. |
| RECIPIENT.POSITION | Recipient's position. |

Review Applicant Daily Summary Email

The following email tags are available for the Review Applicant Daily Summary email:

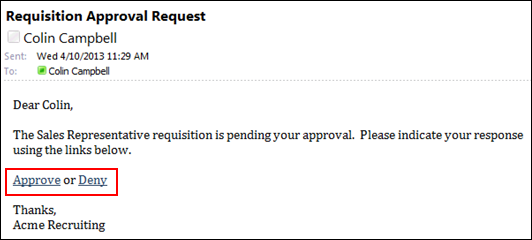
| Tag Name | Description |
| --- | --- |
| ACTION.DATE | Date that the action took place that triggers the email. |
| RECIPIENT.FIRST.NAME | Recipient's first name. |
| RECIPIENT.LAST.NAME | Recipient's last name. |
| REVIEW.APPLICANT.SUMMARY | Displays all applicants who have been moved into a status of the type Review for requisitions for which the recipient is defined as an applicant reviewer.  This tag must be included in the email in order for applicant reviewers to view the applicants who have been moved to the first instance of a status type of Review for a requisition.  Within the email, this tag provides the requisition display name and lists each applicant, who was moved to the first instance of the Review status type, below the display name. Applicants display in alphabetical order by last name.  Applicants are only included in the email if they were moved into a Review status type since the most recent time the email was triggered. |

Requisition Approval from Email

Approvers can submit an approval decision for a job requisition or offer letter directly from the approval email when the APPROVE.DENY.LINK tag is included in the email. This tag is available for the following Recruiting and Offer Letter emails:

* Requisition Pending Approval
* Offer Letter Pending Approval

When included in an email, the tag displays links to approve or deny the requisition. The links display for all recipients of the email. If a recipient who is not an approver clicks the link, then a "Restricted Area" page opens, and the recipient is unable to access the page to submit an approval or denial.



For portals using SSO, clicking Approve or Deny takes the approver to a submittal page. For portals without SSO and for users who are not within the organization's network, clicking the Approve or Deny links opens the portal's log-in page. Once logged in, the approver is taken to the submittal page.

From the submittal page, approvers can enter comments about their decision. There is no character limit for the Comments box. Comments are not required.

For the response to be recorded, the approver must click Submit. This commits the decision to the approval workflow.

Once the approval has been recorded, and for any subsequent times a user clicks the Approve or Deny links, the user is taken directly to a page, after authentication, that displays a message indicating who submitted a response to the approval request and the decision that was recorded.

Note: There are no portal access points from the submittal page.

Forwarded Emails

If the email is forwarded, the recipient is denied access to the submittal page. When the recipient clicks the Approve or Deny link, an access error page opens.

Cancelled Approval Request

If the approval request is cancelled before the approver attempts to access the submittal page, then when the approver clicks the Approve or Deny link, a page opens that displays a message indicating that the approval request has been withdrawn. Note: SSO access is not available from this page.

Changing the Approval Decision

The approval decision cannot be changed via the submittal page. For example, an approver clicks Approve from the email, and then submits their decision from the submittal page. Later, the approver decides not to approve the requisition and clicks the Deny link from the email. The approver is taken to a page that displays a message indicating who submitted a response to the approval request and the decision that was recorded.

Recruiting Custom Fields as Tags

Only Requisition Custom Fields (with tags) and Offer Letter Custom Fields are able to be used in an offer letter. The custom fields are added via tags, which can be viewed by clicking the Display a list of tags link when configuring the email. The custom fields tags that display in the tags pop-up are the fields for which the administrator meets the availability criteria. If the user does not have availability to see the custom field, the tag is hidden in the View Tags pop-up.

Custom fields cannot be used in the following Recruiting emails:

* Job Alert
* New Profile Creation
* Review Applicant Daily Summary
* Today’s Scheduled Interviews

The following email triggers support application custom fields:

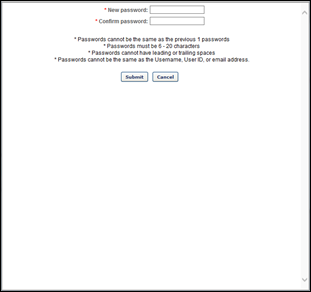
* Applicant Form Complete
* Applicant Status Change
* Assign Applicant Assessment
* Assign Applicant Form
* Assign Integration Assessment
* Candidate hired
* Candidate Offer Response Received
* Disposition
* Email Offer to Candidate
* HireRight Background Check Assigned
* HireRight Background Check Completed
* Integration Assessment Completed
* Interview Cancelled Notification
* Interview Recommendation Nudge
* Interview Recommendation Pending
* Interview Recommendation Recorded
* Interview Scheduling Notification – Applicant
* Interview Scheduling Notification – Interviewer(s)
* Interview Scheduling response
* Invitation to Interview Event (Applicant Self Schedule)
* New Applicant comment posted
* Offer Approval Decision
* Offer Pending Approval
* OnDemand Video Interview Assigned
* OnDemand Video Interview Completed
* Reference Letter Form Complete
* Reference Letter Request (to external references)
* Request References
* Review Applicant
* Send Offer to Candidate Profile
* SHL Assessment Assigned
* SHL Assessment Completed
* Voluntary withdrawal

PASSWORD.RESET.URL Tag

The PASSWORD.RESET.URL email tag can be added to the following Recruitment emails:

* Agency Submission Confirmation
* Applicant Status Change
* Invitation to Apply
* Submission Accepted as Applicant

When included in the above emails, the PASSWORD.RESET.URL tag provides applicants with a link to reset their password for the career site. When applicants click the link in the email, applicants are taken to the reset password page. Applicants enter their new password, click Submit, and are then taken to their My Profile page in the career site.



Email Tags That Support SSO Functionality

See Email Tags That Support SSO Functionality on page 153 for additional information.

Frequently Asked Questions

Is it possible to modify the behavior of an email tag?

No, it is not possible to modify how an email tag functions when included in an email.

Email Tags That Support SSO Functionality

There are currently a limited number of Email Tags that can be used with Single Sign-on (SSO). The following email tags support SSO functionality:

* TRANSCRIPT.LINK
* LAUNCH.TRAINING
* APPROVE.DENY.LINK
* CART.LINK
* INSTRUCTOR.REQUEST.LINK
* WITHDRAW.SESSION.LINK
* REVIEW.APPLICANT.RESUME.SUMMARY
* EVALUATION.LEVEL1
* PDF.LINK
* CHECK-IN.LINK
* COMMUNITY.POSTING.LINK

If Review Task Central is enabled, the REVIEW.LINK email tag in Step Assigned and Step Due emails allows the use of an SSO deep link, if SSO is enabled in the portal.

Note: The REVIEW.LINK email tag only works with Task Central for step due and step assigned emails.

When SSO email tags are placed in the body of the email, the email recipient will see the full URL of the link. If you wish to hide the link behind text, you can use the hyperlink manager feature. Instructions can be found here: [**https://csod.my.site.com/supportcentral/s/article/How-to-embed-an-email-tag-with-link-text**](https://csod.my.site.com/supportcentral/s/article/How-to-embed-an-email-tag-with-link-text)

Note: Deep linking email tags are only available if they are enabled by a backend setting. To enable this functionality, contact Global Customer Support.

Related Resources

[**Broken deep-link when using: TRANSCRIPT.LINK, LAUNCH.TRAINING, or EVALUATION.LEVEL1**](https://cornerstoneondemand.my.site.com/s/articles/Broken-deep-link-URL-when-using-LAUNCH-TRAINING-and-TRANSCRIPT-LINK)

[**Can Deep Links be created for Playlists?**](https://cornerstoneondemand.my.site.com/s/articles/Can-Deep-Links-be-created-for-Playlists)

Email Triggers

Below is a list of the email triggers that are currently available. You can set-up multiple types of emails for each one and enable or disable the emails as you wish.

Billing Emails

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

|  |  |  |
| --- | --- | --- |
| Order Status Adjusted | This email is triggered when a user's order status is changed. This email can be sent to a specific user, position, Purchaser, or Order Status Adjuster. | Billing |

|  |  |  |
| --- | --- | --- |
| Pending Payment Notification | This email is triggered when a user checks out using the Send Bill functionality and is subject to the Pending Payment status. This alerts them that they are in Pending Payment status. This email can be sent to a specific user, position, or the Purchaser. Note: This email trigger does not fire for Training Unit purchases. | Billing |

|  |  |  |
| --- | --- | --- |
| Shopping Cart Purchase | This email is triggered when a shopping cart purchase is made. This email can be sent to the shopping cart owner or the purchase actor. | Billing |

|  |  |  |
| --- | --- | --- |
| Transaction Price Adjusted | This email is triggered when a transaction price is adjusted by an administrator. This email can be sent to a specific user, the Purchaser, or Price Adjustor. | Billing |

|  |  |  |
| --- | --- | --- |
| Transaction Price Refunded | This email is triggered when a transaction price is refunded and a course is removed from a transcript by an administrator. This email can be sent to a specific user, the Purchaser, or Refunding Administrator. | Billing |

|  |  |  |
| --- | --- | --- |
| Unpurchased Items in Shopping Cart | This email is triggered when a user adds at least one item to their shopping cart. When the email is triggered, any existing items in the shopping cart that can no longer be purchased are removed. The email can be sent to Shopping Cart Owner or a specific user. This email can be configured as a Reminder type email. This email is active by default and can be found in the Billing action type section of Email Administration.  Users may receive this email multiple times, depending on the configuration in Email Administration. For example, the administrator configures two emails, one that triggers three days after the user adds an item to their cart without purchasing the item, and another email that triggers seven days after the unpurchased item is added to the cart.  This email trigger is reset each time the shopping cart is emptied or when a purchase is complete.  Use Case: Use this email to remind users that there are unpurchased items in their shopping cart.  Note: The email is not triggered if all of the unpurchased training in the shopping cart is expired. | Billing |

Certification Emails

All certification emails can be sent to the certification candidate, certification candidate manager, or certification owner.

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Approve Certification | This email is triggered when a user's request to enroll in a certification is approved. | Certification |

|  |  |  |
| --- | --- | --- |
| Assigned Certification | This email is triggered when a user is assigned a certification; the certification still requires registration and approval. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification Credits Adjusted | This email is triggered when an administrator manually adjusts a user's credits that are applied to a certification from the Certification Report page. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification Credits Received | This email is triggered when a user receives credit for completing a training item that is applied to a certification. If the learning object applies to multiple certifications, only one email is fired. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification Due Date Adjusted | This email is triggered when a certification due date is changed. This email can be sent to the Certification Candidate, Certification Candidate Manager, or Certification Owner. If the new certification due date is after the time the Certification Period Due email is scheduled to be sent, the Certification Due Date Adjusted email is not triggered. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification External Training Credit Applied | This email is triggered when credit from external training is approved and applied to the certification. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification External Training Credit Denied | This email is triggered when a request to apply external training to a certification is denied. This email is active by default. This email can be configured as a confirmation, notification, or reminder type email. The email can be sent to Certification Candidate, Certification Candidate Manager, Certification Owner, or a specific user.  Use Case: Upon reviewing a user's request to apply external training from a local university to the Customer Service Certification, the certification approver denies the request. The user is notified by email that the request is denied. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification External Training Credit Submission Confirmation | This email is triggered when a user submits external training for certification credit. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification On Hold | Administrators can configure an email notification to automatically send to users when their certification is placed in an On Hold status using the Certification On Hold email trigger. The existing tags for Certification emails are available with the Certification On Hold email trigger. | Certification |

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| --- | --- | --- |
| Certification Period Begin Reminder | This reminder email is triggered when a certification period begins. | Certification |

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| --- | --- | --- |
| Certification Period Completion Notification | This email is triggered when a user has successfully completed all requirements for a certification period. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification Period Expiration | This email is triggered as a reminder that the certification period expiration is approaching. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification Period Overdue Notification | This email is triggered when a user has not completed the certification requirements by the due date or the certification expiration date. If all requirements are complete, this email is not triggered. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification Reversioned | This email is triggered when a user has been moved to a new version of a certification. | Certification |

|  |  |  |
| --- | --- | --- |
| Certification Revoked | This email can be configured to be triggered when a user's certification status is set to Revoked. This email can be configured as a confirmation, notification, or reminder. When configured as a confirmation or notification, the email is triggered immediately after a certification is revoked. When configured as a reminder, the email is triggered on the defined date relative to the certification being revoked as long as the status of the user's certification is still Revoked. The available recipients in the Send To and CC fields are Certification Candidate, Certification Candidate's Manager, and Certification Owner. | Certification |

|  |  |  |
| --- | --- | --- |
| Deny Certification | This email is triggered when a user's request to enroll in a certification is denied. | Certification |

|  |  |  |
| --- | --- | --- |
| Enrolled in Certification | This email is triggered when a user becomes enrolled in a certification via assignment or proxy enrollment. This email is triggered for the initial enrollment, but is not triggered for renewal periods. | Certification |

|  |  |  |
| --- | --- | --- |
| Remove Certification | This email is triggered when an administrator removes a certification for a user from the Certification Management page using the delete icon (trash can). Bulk Removals done through the certification removal tool or removal triggered through the dynamic removal setting on a dynamic certification proxy enrollment will not trigger the Remove Certification email. | Certification |

|  |  |  |
| --- | --- | --- |
| Request Certification | This email is triggered when a user submits a request to enroll in a certification. | Certification |

Collaborative Learning Emails

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

|  |  |  |
| --- | --- | --- |
| Assign Cohort | This email is triggered when a cohort learning object (LO) is assigned to a user. This email can be sent as a notification to Next approver if training request is pending, Assignor of the training, Cost center approver, Cost center owner, Cohort Instructor, Cohort Training Contact, User's manager, Student, User's Approver, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

|  |  |  |
| --- | --- | --- |
| Cohort Changed | This email is triggered when the cohort Start Date, End Date, Instructor, or Structure is modified and the cohort has at least one enrolled user. This email can be sent as a notification to the Cohort Instructor, Student, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

|  |  |  |
| --- | --- | --- |
| Cohort End Date | This email is triggered at a certain time before or after the end date of a cohort learning object (LO). All instances of this email are added to the email queue when the cohort is created. Any email triggers that are configured to be sent before the cohort end date are only sent if the email trigger is configured before the cohort is created. If the cohort end date is modified, then all queued emails are updated to reflect the new start date. This email can be sent as a notification, confirmation, or reminder to Cohort Instructor, Cohort Training Contact, Student, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

|  |  |  |
| --- | --- | --- |
| Cohort Start Date | This email is triggered at a certain time before or after the start date of a cohort learning object (LO). All instances of this email are added to the email queue when the cohort is created. Any email triggers that are configured to be sent before the cohort start date are only sent if the email trigger is configured before the cohort is created. If the cohort start date is modified, then all queued emails are updated to reflect the new start date. This email can be sent as a notification, confirmation, or reminder to Cohort Instructor, Cohort Training Contact, Student, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

|  |  |  |
| --- | --- | --- |
| Register Cohort | This email is triggered when a user registers for a cohort learning object (LO). This email can be sent as a notification to Assignor of the training, Cost center approver, Cost center owner, Cohort Instructor, Cohort Training Contact, User's manager, Student, User's Approver, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

|  |  |  |
| --- | --- | --- |
| Request Cohort | This email is triggered when a user requests a cohort learning object (LO). This email can be sent as a notification to Next approver if training request is pending, Cost center approver, Cost center owner, Cohort Instructor, Cohort Training Contact, User's manager, Student, Training Owner, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

|  |  |  |
| --- | --- | --- |
| Video Comment - New | This email is triggered when a new comment is added to a collaborative learning video. This email can be sent as a notification to Cohort Instructor, Video Comment Author, Video Comment Author's Manager, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

|  |  |  |
| --- | --- | --- |
| Video Comment - Reply | This email is triggered when an instructor replies to a comment that was added to a collaborative learning video. This email can be sent as a notification to the Video Comment Author, Video Comment Author's Manager, or a specific user. | Collaborative Learning |

Compensation Management Emails

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

|  |  |  |
| --- | --- | --- |
| Compensation Overall Task Completion | This email is triggered when the entire compensation task is completed for all assigned user. | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Approval Denied | This email is triggered when a compensation task is denied by the approver. This email is sent to the Compensation Manager. | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Assigned | User is assigned to a compensation task | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Completion | This email is triggered when a compensation task is completed for a user, including all approvals. | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Due: Assignee | Compensation task is due for Assignee | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Due: Task Approver | Compensation task is due for Task Approver. This trigger allows administrators to include the task assignee as a tag in the subject and body of the emails. This enables approvers who receive the emails to easily identify whose compensation task requires approval.  The task assignee tag (ASSIGNEE.NAME) is only available for use in the subject and body of the affected emails. This tag displays the full name of the user who is assigned the task. | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Edited | This email notifies compensation managers (or other task assignees) that their submitted compensation plan has been edited by an approver during the approval workflow. The following actions trigger the email:   * An approver edits any component in the compensation plan during the approval workflow and saves the plan. * The approver edits any component in the compensation plan during the approval workflow and subsequently approves or denies the plan. | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Request Approval | Users requests approval for compensation task. This trigger allows administrators to include the task assignee as a tag in the subject and body of the emails. This enables approvers who receive the emails to easily identify whose compensation task requires approval.  The task assignee tag (ASSIGNEE.NAME) is only available for use in the subject and body of the affected emails. This tag displays the full name of the user who is assigned the task. | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Reset | This email is triggered when a compensation task is reset by the administrator. This email is also triggered when a compensation task resets because the compensation manager is changed for a user. | Compensation |

Connect (Old Connect) Emails

Note: Email links in Connect-related emails link to postings for portals that use Single Sign On (SSO). When users click the link in the email, the user is taken directly to the linked posting.

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

|  |  |  |
| --- | --- | --- |
| Comment Added - Subscribed Posting | Notify a posting subscriber that a comment has been added to the posting. Posting types where a comment or response is added include types, File, URL, Q&A, Suggestions, Forum, Blog entry, Webcast episode and Podcast episode. | Connect |

|  |  |  |
| --- | --- | --- |
| Comment/Response Added to Posting | Notify a posting author that a comment has been added to the posting. Posting types where a comment or response is added include types, File, URL, Q&A, Suggestions, Forum, Blog entry, Webcast episode and Podcast episode. If a comment was made to the second author's posting in a blog, the email notification will go Author #2, not the author who created the first blog posting (Author 1). | Connect |

|  |  |  |
| --- | --- | --- |
| Connect Posting Approval Request | User has added a posting which requires approval | Connect |

|  |  |  |
| --- | --- | --- |
| Connection Request | A user has requested a connection | Connect |

|  |  |  |
| --- | --- | --- |
| New Connect Profile Comment Posted | Notify user that a comment has been posted to their Connect Profile. The email will contain text from Comment left on Profile. | Connect |

|  |  |  |
| --- | --- | --- |
| New Posting Added - Subscribed Author | New posting has been added by your subscribed author | Connect |

|  |  |  |
| --- | --- | --- |
| New Posting Added - Subscribed Topic | New posting has been added in a subscribed topic | Connect |

|  |  |  |
| --- | --- | --- |
| New Posting added to Blog/Podcast/Webcast | Notify users who are subscribed to a Blog, Podcast or Webcast, that a new posting has been added. | Connect |

|  |  |  |
| --- | --- | --- |
| Posting Has Been Modified | Notify users who are subscribed to the posting, that the posting has been modified. All Posting types are recognized for this email trigger. | Connect |

|  |  |  |
| --- | --- | --- |
| Question Answered | Expert has answered a question in Connect | Connect |

|  |  |  |
| --- | --- | --- |
| Question Asked in Area of Expertise | User has posted a question in Connect | Connect |

Default Password Administration Emails

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

|  |  |  |
| --- | --- | --- |
| Default Password Email Reminder Template | This email trigger can be used as a reminder when the default password is nearing expiration. This email is triggered a certain number of days before the default password expires. Administrators can configure when the email is triggered in relation to the default password expiration date. The emails are queued when the default password is set, so it is important to configure this email trigger prior to setting the default password. This email can be configured as a Reminder type email. This email can be sent to a specific administrator user. | Default Password Administration |

Employee Onboarding Emails

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

|  |  |  |
| --- | --- | --- |
| Employee Onboarding Cancelled | This email is triggered when Onboarding is cancelled. The email can be sent to Onboarding User, User's Approver, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management. | Employee Onboarding |

|  |  |  |
| --- | --- | --- |
| Employee Onboarding Started | This email is triggered when Onboarding is started and when emails are configured for the given employee onboarding process. The email can be sent to Onboarding User, User's Approver, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management. | Employee Onboarding |

|  |  |  |
| --- | --- | --- |
| Integration Task Assigned | This email is triggered when a user is assigned an onboarding task. This email can be sent to Assignee or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management.  Use Case: Use this trigger to notify recipients that an integration task has been assigned. | Employee Onboarding |

|  |  |  |
| --- | --- | --- |
| Integration Task Completed | This email is triggered when an integration task is completed. The email can be sent to Onboarding User, User's Approver, User's Future Manager, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Administration.  Use Case: Use this trigger to notify recipients that an integration task has been completed. | Employee Onboarding |

|  |  |  |
| --- | --- | --- |
| Onboarding Form Assigned | This email is triggered when an onboarding form is assigned to a user through an onboarding workflow. The email can be sent to Form Assignee, User's Future Manager, or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management.  Use Case: Use this email to notify or remind a user that they have been assigned an onboarding form as part of an onboarding workflow. | Employee Onboarding |

|  |  |  |
| --- | --- | --- |
| Onboarding Form Completed | This email is triggered when an onboarding form is completed by a user. The email can be sent to Form Assignee, Form Assignee Manager, User's Future Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management.  Use Case: Use this email to notify a user that they have been assigned an onboarding form as part of an onboarding workflow. | Employee Onboarding |

|  |  |  |
| --- | --- | --- |
| W-4 Forms Pending | This email is triggered when a Forms Pending status is received from CIC Plus. The status is received when there are still pending W-4 forms for a user to complete after they have completed at least one W-4 form on the Paperless Employee website. The email can be sent to Onboarding User, User's Approver, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Administration.  Use Case: This trigger notifies users that they have pending W-4 forms to complete. | Employee Onboarding |

Form Management Emails

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

|  |  |  |
| --- | --- | --- |
| Form Approval Completed | This email is triggered when a form request is completed by the approver. The form request is considered Completed if the request is approved, denied, or denied and returned. The email can be sent to Form Responder, Request Recipient, or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default.  This email is triggered by the status of the form request, not the status of the form. For example, if the form approval request is denied and returned, the form status is Returned but the email is triggered because the form approval request is considered Completed.  Note: The form responder is the user who submitted the form.  Use Case: This trigger notifies the form responder (user who submitted the form) and approvers that the form approval request is completed. | Form Management |

|  |  |  |
| --- | --- | --- |
| Form Approval Required | This email is triggered when a form request is assigned to an approver. The email can be sent to Request Recipient or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Form Management action type section of Email Administration.  Use Case: This trigger notifies approvers that they have a pending form approval request to complete. | Form Management |

|  |  |  |
| --- | --- | --- |
| Form Assigned | This email is triggered when a form is assigned to a user. The email can be sent to Form Assignee or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications and reminders to users when forms are assigned. | Form Management |

|  |  |  |
| --- | --- | --- |
| Form Completed | This email is triggered when a form that is associated with a form task is completed. This email is not triggered if the form is not associated with a form task. The email can be sent to Form Assignee, Form Assignee Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications to users when form tasks are completed. | Form Management |

|  |  |  |
| --- | --- | --- |
| Self-Service Form Submitted | This email is triggered when a self-service form is submitted for the given form. The email can be sent to Approver, Form Respondent, Manager, or a specific user. When a form is submitted via proxy, this email is not sent to the proxy user. This email can be configured as a Notification type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications when self-service forms are submitted. | Form Management |

ILT Administration Emails

|  |  |  |
| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

|  |  |  |
| --- | --- | --- |
| Advanced Registration Closed | Advanced registration expires | ILT Administration |

|  |  |  |
| --- | --- | --- |
| Advanced Registration Open | Advanced registration is open for interested users | ILT Administration |

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| --- | --- | --- |
| Cancel Session | ILT Session is cancelled. This email will only fire for current/upcoming sessions and will not fire if the session dates were in the past when the session was cancelled.  The REASON.CANCEL.SESSION tag is available for the Cancel Session email so that the reason entered by the administrators when the session was cancelled can be included in the email. This tag will display the reason selected in the drop-down by the administrator who cancelled the session. | ILT Administration |

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| Deny Facility Request | When a Facility/Location is requested for an Event/Session, a Facility Details window appears. Within this window is a Confirmation Required column with a selection box to require the location to be confirmed before the Session is approved. This email will fire to the selected recipients when the Event/Session is requested, followed by a denial from the administrator at the Facilities & Resources/View Facilities Requests function. | ILT Administration |

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| Deny Instructor's Request | Instructor denied request for a Session | ILT Administration |

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| Deny Resource Request | In the Facilities & Resources/View Resource Requests functions, an administrator can view and respond to all Resource Requests. This email will fire once a Request is Denied. | ILT Administration |

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| Grant Facility Request | When a Facility/Location is requested for an Event/Session, a Facility Details window appears. Within this window is a Confirmation Required column with a selection box to require the location to be confirmed before the Session is approved. This email will fire to the selected recipients when the Event/Session is requested, followed by approval from the administrator at the Facilities & Resources/View Facilities Requests function. | ILT Administration |

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| Grant Instructor's Request | Instructor grants request for a Session | ILT Administration |

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| Grant Resource Request | In the Facilities & Resources/View Resource Requests functions, an administrator can view and respond to all Resource Requests. This email will fire once a Request is Granted. | ILT Administration |

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| ILT Session becomes Available | Session is approved and available for enrollment. If this email is created with a Send To of "Interested users," it will trigger an email to users on the Interest Tracking list if the users are included in the session availability criteria for the session when that session is created. | ILT Administration |

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| ILT Session Marked as Completed | Instructor marked Session as completed | ILT Administration |

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| Prerequisite is Due | Prerequisite is due for a Session | ILT Administration |

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| Registration Deadline | ILT Session registration deadline | ILT Administration |

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| Request Facility | Within the Session Schedule set-up, it is required to Request a Facility/Location for a Session. This email is fired upon request. | ILT Administration |

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| Request Instructor | This email is triggered when an instructor is requested (added or updated) for a session. This setting is configured when defining a part for a session. This email is triggered in the following conditions: a new session is created with an instructor, the schedule/location of an existing session is modified, the min/max number of participants accepted for the session is modified, the no-show penalty is changed or the session price is changed. | ILT Administration |

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| Request Resource | In the Facilities & Resources/View Facilities Requests functions, Resources (projectors, chairs, etc.) can be applied to each Facility. Once Resources are set-up, they can be applied to a Session when creating/editing an Event/Session. When editing or creating a Resource, there is a box for an Approval Required selection. If this is selected, this email will fire to recipients such as the Resource owner or Session Contact for approval upon request. | ILT Administration |

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| Request Webcast Instructor | Request Webcast instructor for a Session | ILT Administration |

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| Session Changed | The Session Changed email is triggered if the following session fields were changed: Part Name, Part Description, Advanced Registration Settings, Instructor, Location, No Show Penalty, Pre-work/Post-work/Prerequisite Details, Session Charge Date, Start or End Dates and Times, and Waitlist Deadlines.  The following conditions can be used with this email:   * CURRENT.REGISTRATION, MAX.REGISTRATION, MIN.REGISTRATION * NO.SHOW.PENALTY.CHANGED - Will be triggered when the no-show penalty is changed * PRICE.CHANGED - Will be triggered when the session price is changed * SCHEDULES.CHANGED - Will be triggered when any of the following fields are changed: part name, description, location, room layout, resource, instructor, start/end date/times, display times in time zone of user toggle, time zone, part break, part occurrence, pre-work, post-work * TIMETABLE.CHANGED - Will be triggered if any of the following fields are changed: location, start/end date/times, time zone, part occurrence * INSTRUCTOR.CHANGED - Will be triggered if an instructor is added or removed from a session (changing an instructor from primary to secondary does not trigger the email) * PRE.POST.TRAINING.CHANGED - Will be triggered if a pre-work or post-work is added, removed, or made mandatory (if it is made optional, the email is not triggered) * The COMMENT tag is relevant in combination with this condition. It displays the comments entered by the session administrator or instructor when the changes for this session were saved   This email is sent when the following conditions are met:   * The session is in an Approved status * The last part of the session is not yet finished   When using the condition TIMETABLE.CHANGED or INSTRUCTOR.CHANGED, the email is only triggered if the change concerns at least one current or future part  Note: When the Session Changed email is configured as a meeting invitation, the email will only trigger for parts that are current or in the future. | ILT Administration |

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| Session End Date | ILT Session end date | ILT Administration |

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| Session Post-work Due Date | This email is triggered by the due date of the session post-work. The email is sent to all users indicated in the email regardless of post-work completion status. For this email trigger, there is an option to indicate which parent the pre-work/post-work email is generating from.   * A separate email is fired for each individual post-work item. * POSTWORK.TITLE is available to reference the title of the training item that is due. With this tag, administrators can create emails notifying the users of the courses that are due and the Sessions that they are associated with. | ILT Administration |

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| Session Pre-work Due Date | This email is sent to a student a specified number of days prior to the start of an ILT session if they have not yet completed the session's pre-work assignments. If all pre-work is completed by the student prior to the trigger date for the reminder, the email is not sent to that student. If one or more pre-work assignments are not yet complete, however, the email reminder fires to the student. For this email trigger, there is an option to indicate from which parent the pre-work/post-work email is generating.   * A separate email is fired for each individual pre-work item. * The PREWORK.TITLE tag is available to reference the title of the training item that is due. With this tags, administrators can create emails notifying the users of the courses that are due and the Sessions that they are associated with. | ILT Administration |

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| Session Start Date | ILT Session start date.  Use Case: Use this trigger to remind users of the start date for a session for which they are registered. If configuring the Session Start Date email as a reminder, select "Reminder" in the Type field drop-down. Then, determine when the email should be sent by configuring the number of days/hours to send the email before the session's start date. Also, in the Send To field, be sure to send the email to "Registered Students."  The WITHDRAW.SESSION.LINK email tag can be added to Session Start Date emails via Email Administration. When learners receive an email using this tag, they will see a link instead of a tag. Clicking this link navigates them to the Cancel Registration page for the selected event. | ILT Administration |

Instructor Led Training Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Approve ILT Session | Approval settings can be set within the Event/Session or within the user details page. If approval is required, the requested training will remain in pending approval status until the approver approves, defers, or denies the request. This email is fired when an Approver approves a request for an ILT session. This email can be used to notify the student that the request has been approved or to notify a particular approver in the approval workflow (e.g., Cost center approver or User's manager). | Instructor Led Training |

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| Assign ILT Session | This email trigger will fire when a manager assigns an ILT session to users or an administrator uses a learning assignment to assign an ILT session to users. | Instructor Led Training |

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| Cancel Registration (with withdrawal penalty) | In the Event/Session Details step, there is a Penalty for Withdrawal column. There is an Add Withdrawal Penalty link that opens up text boxes to apply a percentage or dollar amount, and the amount of days prior to the Session date when the user cancels, where these would be applied. Once a user withdraws from a Session, the selected recipients will receive this email, and the withdrawal penalty is applied. | Instructor Led Training |

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| Cancel Registration (without withdrawal penalty) | In the Event/Session Details step, there is a Penalty for Withdrawal column. If the Add Withdrawal Penalty is not selected, and the user withdraws from a Session, the selected recipients will receive this email stating that no withdrawal penalty has been applied. | Instructor Led Training |

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| Deny Exception Request | Once a user has submitted a Grant Exception Request, they will remain in Exception Requested status until an administrator makes the decision to grant or deny the request. Once the ILT administrator denies the user's request, this email will fire to the selected recipients. | Instructor Led Training |

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| Deny Waitlist Request | Once a user has submitted a Waitlist Request, they will remain in Waitlisted status until an administrator makes the decision to grant or deny the request. If the ILT administrator denies the user's request to attend a Session, this email will be triggered. | Instructor Led Training |

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| Exception Request | An Exception Request is created when a user submits a request for an Event/Session in which the prerequisites are not met, or the Event/Session is not available to the user. When this type of request is submitted, the selected recipients will receive this email. Note: Within the Availability step when editing or creating an Event/Session, there is the option to not allow users to request this Session by Exception Request. | Instructor Led Training |

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| Grant Exception Request | Once a user has submitted a Grant Exception Request, they will remain in Exception Requested status until an administrator makes the decision to grant or deny the request. Once the ILT administrator grants the user's request, this email will fire to the selected recipients. | Instructor Led Training |

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| Grant Waitlist Request | Once a user has submitted a Waitlist Request, they will remain in Waitlisted status until an administrator makes the decision to grant or deny the request. If the ILT administrator grants a user's request to attend a session, this email will be triggered.  When a user withdraws from a session and a seat becomes available, users on the waitlist are removed from the waitlist, they are granted the option to register for the open seat, and this email is triggered, if enabled. The waitlisted users will see the session on their transcripts in "Registration Pending" status.   * As soon as one of the user registers, all other users are moved back to the waiting list. In this scenario, if another user withdraws, the process is completed again for the users remaining on the waitlist. * If none of the users register, the previously waitlisted users are not moved back to the waiting list. In this scenario, if another user withdraws, since no users are on the waiting list in that moment, this email is not triggered.   When a user withdraws from a session after the registration deadline, this email is not triggered. | Instructor Led Training |

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| ILT Session Marked as Complete | This email can be used to notify users that an ILT session has been marked complete. | Instructor Led Training |

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| ILT Session Register | Once a user registers for an ILT session, this email can be sent to the student, approvers, assignors, instructors, and anyone else who would need information about the registered session. This email will not be triggered after the session start date, regardless of the session end date.  This email does not include Accept or Deny options when it is sent as a calendar invitation because this email does not interact with the Cornerstone system. It is designed to only allow recipients to save the session to their calendar. | Instructor Led Training |

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| ILT Session Seats Available | The ILT Seats Available is sent to users when session seats are available when the following are true:   * The Allow Auto Management of Waitlist option is turned off for the session. * The waitlist deadline is before the registration deadline, and the registration deadline has not yet passed. | Instructor Led Training |

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| ILT Session Substitution | This email is fired to selected recipients when a user is withdrawn from an ILT Session, and another user has been registered as a replacement. | Instructor Led Training |

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| Request ILT Session | This email trigger will fire when a user submits a request for an ILT session. This trigger can also be set up to keep session instructors, administrators, and session contacts informed with the details of the session.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Instructor Led Training |

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| Session Start Date | ILT Session start date.  Use Case: Use this trigger to remind users of the start date for a session for which they are registered. If configuring the Session Start Date email as a reminder, select "Reminder" in the Type field drop-down. Then, determine when the email should be sent by configuring the number of days/hours to send the email before the session's start date. Also, in the Send To field, be sure to send the email to "Registered Students."  The WITHDRAW.SESSION.LINK email tag can be added to Session Start Date emails via Email Administration. When learners receive an email using this tag, they will see a link instead of a tag. Clicking this link navigates them to the Cancel Registration page for the selected event. | ILT Administration |

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| Session Transcript Status Changed by Roster Submission | This Event is fired for each user separately by the instructor submitting the roster. This Event will only be fired for users whose Session transcript statuses have changed. For required evaluations attached to ILT sessions, you can configure this email trigger to automatically notify users as soon as the roster is updated and the session marked complete.  In this trigger, you can set a condition so that the email is only triggered when the student's status is changed to a specific status. For example, you can set the condition in the following syntax:   * STUDENT.TRANSCRIPT.STATUS==TRANSCRIPT.STATUS.[Enter the desired status here (e.g., NOSHOW, PENDINGEVALUATION)]   If the PENDINGEVALUATION status is used, then as soon as a user's attendance is updated on the roster and session marked complete, the user's transcript status changes to Pending Evaluation, (if the evaluation is marked as required) and this causes the email to fire to the user. | Instructor Led Training |

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| Waitlist Acceptance Deadline | Within the Session Details is a column called Waitlist Deadlines. In this column, the admin can set up a waitlist acceptance deadline within days and hours of the Session start time, purpose being to place an expiration time for the waitlist before the Session starts. This email will fire to let the user know a seat will not become available in the requested Session. | Instructor Led Training |

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| Waitlist Expires | This email is triggered when a waitlist expires before the session start date. | Instructor Led Training |

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| Waitlist Request | When sessions are set up, there is minimum and maximum registration which refers to the amount of seats available. When all seats have been filled, and the session is full, a user is asked if they would like to make a request to be placed into a waitlist. This does not guarantee a seat, but simply allows them to submit the request in case a seat becomes available. The Waitlist Request email will fire to approvers, managers, etc. when the user makes this request. | Instructor Led Training |

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| Withdraw from Waitlist | This email is fired to selected recipients when a user withdraws from a Session waitlist. | Instructor Led Training |

Knowledge Management (Old) Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Knowledge Bank Posting Request | Management User has added a Knowledge Bank posting which requires approval | Knowledge Management |

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| Question Answered | Expert has answered a Knowledge Bank question | Knowledge Management |

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| Question Asked in Area of Expertise | User has posted a question in the Knowledge Bank | Knowledge Management |

License Management Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| License Added | New batch of licenses added. | License Management |

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| License Expiration | Occurs when a batch of licenses is going to expire. | License Management |

NASD Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| FINRA Registration Email | Notify the user of FINRA Registration. | NASD |

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| FINRA User Ref Email | Notify the user of FINRA User Ref Number. | NASD |

New Connect Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Assigned Connect Task | This email is triggered when a member of a Connect team is assigned a task within the team. This email can be sent as a notification to Task Assignee, Task Leader, Team Lead, or a specific user. Note: This email may be triggered when a Connect task is created or edited. When editing a task, the email is not triggered unless the task assignee is modified. | New Connect |

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| Connect Team Feed User Update | This email is triggered when a member of a Connect team posts a user update to the Team Feed. This email can be sent as a notification to Team Members, Team Lead, or a specific user. Note: This email is triggered when a parent post is created, whether it is posted directly from the Team Feed page or through the Live Feed page. Any attached files or links from the user update do not display in the email. | New Connect |

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| Connect Team Invitation | This email is triggered when a user receives an invitation to a Connect team. This email can be sent as a notification to Invitation Recipient or a specific user. | New Connect |

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| Joined Community | This email is triggered when a user becomes a member of a community. This email can be sent as a notification to New Member, Community Moderator, or a specific user. Note: For invitation only communities, this email is triggered when the user joins the community. For automatic enrollment communities, this email is triggered when the community settings are saved with the user being added to the availability criteria. | New Connect |

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| Knowledge Bank/Communities New Completed Suggestion | This email is triggered when a suggestion posting is marked as Completed in the Knowledge Bank or a community. This also applies when a posting is marked as Completed, then unmarked as Completed, and then marked as Completed again. This email can be sent as a notification to Posting Creator, Community Moderator, or a specific user. | New Connect |

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| Knowledge Bank/Communities New Featured Posting | This email is triggered when a posting is marked as featured in the Knowledge Bank or a community. This email can be sent as a notification to Posting Creator, Community Moderator, Community Members, or a specific user. Note: This email is triggered any time a posting is marked as featured, even if the posting was unmarked and then remarked as featured. A recipient must match the following criteria to receive the email:   * User is within the availability criteria for the corresponding posting's parent topic. * User is within the constraints of the posting's parent topic's creator constraints. * User is a member of one of the communities with which the topic is shared. | New Connect |

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| Knowledge Bank/Communities New Posting Created | This email is triggered when a new Knowledge Bank or community posting is created. This email can be sent as a notification to Community Moderator, Community Members, Follower, or a specific user. A recipient must match the following criteria to receive the email:   * User is within the availability criteria for the corresponding posting's parent topic. * User is within the constraints of the posting's parent topic's creator constraints. * User is a member of one of the communities with which the topic is shared. | New Connect |

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| Knowledge Bank/Communities Question Answered | This email is triggered when a Q&A posting is marked as Answered in the Knowledge Bank or a community. This also applies when a posting is marked as Answered, then unmarked as Answered, and then marked as Answered again. This email can be sent as a notification to Community Moderator, Posting Creator, or a specific user. | New Connect |

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| Knowledge Bank/Communities Question Asked | This email is triggered when a Q&A posting is created in the Knowledge Bank or a community. This email can be sent as a notification to Expert, Community Moderator, or a specific user. | New Connect |

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| Knowledge Bank/Communities Reply | This email is triggered when a user replies to a posting in the Knowledge Bank or a community. This email can be sent as a notification to Author, Community Moderator, Community Members, Follower, or a specific user. If the reply is added directly to the posting, then Author refers to the posting creator. If the reply is added to another reply, then Author refers to the posting creator and the author of the original reply. Note: This email is triggered even if the same user makes multiple replies to the same posting. | New Connect |

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| New Connection Request | This email is triggered when a user receives a connection request. This email can be sent as a notification to Request Recipient or a specific user. Note: This email is only triggered for connections within New Connect, not Old Connect. | New Connect |

Observation Checklist Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Checklist Approval Denied | This email can be configured as a notification. When configured as a notification, the email is triggered immediately after a checklist changes from Pending Completion Approval status to Denied status. The available recipients in the Send To and CC fields are User's Manager, Checklist Verifier, or Assessee. | Observation Checklist |

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| Observation Checklist Assigned | This email is triggered when an observation checklist task is assigned. | Observation Checklist |

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| Observation Checklist Changed | This email is triggered when the competency model of an observation checklist has changed. | Observation Checklist |

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| Observation Checklist Completed | This email is triggered when an observation checklist is completed. | Observation Checklist |

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| Observation Checklist Due | This email is triggered as a reminder when an observation checklist's due date is approaching. | Observation Checklist |

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| Observation Checklist Pending Completion Approval | This email can be configured as a notification. When configured as a notification, the email is triggered immediately after a checklist changes from In Progress status to Pending Completion Approval status. The available recipients in the Send To and CC fields are User's Manager, Checklist Verifier, or Assessee. | Observation Checklist |

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| Observation Checklist Removed | This email is triggered when an observation checklist is removed for a user. | Observation Checklist |

Other Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Copy Down Scheduled | A copy down completely copies your database from one environment to another. The Copy Down Scheduled email is triggered when a copy down is scheduled in the environment in which the email is enabled. This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled. For example, if a copy down is scheduled in Pilot from Production, the email is only triggered if the email is configured in Pilot. This email trigger ignores deadbox settings.  The following tags are available for this email trigger:   * DESTINATION.ENVIRONMENT * PORTAL.NAME * RECIPIENT.FIRST.NAME * RECIPIENT.LAST.NAME * REQUESTOR.EMAIL * SCHEDULE.DATETIME * SOURCE.ENVIRONMENT   It is highly recommended that the portal name, source environment, and destination environment email tags are included in the email body to ensure it is clear which portals and environments are being impacted by the copy down. | Other |

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| Login Message Email | This email is triggered when a recipient clicks an Action button that is configured in a login message to send an email to the recipient. The Login Message Email can only be added to login messages, which are configured in Login Message Preferences. | Other |

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| Recurring Billing Processor Event | This email is triggered when a user renews a subscription from the transcript page or when a manager assigns a curriculum extension to a user through inventory. This email can be sent to a specific user or the person in the Purchaser role. The user's manager can be copied on the email. | Other |

Performance Management Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Assessment Task Completion | This email is triggered when the entire assessment task is complete, regardless of the task due date. This email can be sent to the assessee or a specific user. | Performance Management |

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| Assessment Task Due Date | Occurs when assessment task is due. | Performance Management |

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| Assessor Assessment Task Assigned | This is triggered when a user is selected as an assessor for a competency assessment task. This email is triggered when an assessor is selected during the task configuration, when assessors are selected by a reviewee from within the competency assessment (when approval is not required), and when a selected assessor needing approval is approved. This email can be sent as a confirmation, notification, or a reminder to Assessor(s) or a specific user. | Performance Management |

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| Check-In Created | This email is triggered when a new Check-In series is created. This email can be sent to Check-Ins participants, Check-In creators, or a specific user. | Performance Management |

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| Development Plan Approval Denied | This email is triggered when a development plan approval request is denied. The user receives the email stating that their Development Plan Approval Request is denied. | Performance Management |

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| Development Plan Approval Granted | This email is triggered when a user's development plan is approved. This email is sent to the user who submitted the plan. | Performance Management |

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| Development Plan Approval Requested | This email is triggered when a development plan that requires approval has been submitted. The user in the approver role receives the email stating that a new development plan now exists in their list of development plans to approve. If the "Plans must be approved by" preference is not selected, this email is not triggered. | Performance Management |

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| Development Plan Assigned | This email is triggered when a development plan has been created by anyone other than the user. The user receives the email stating that a new development plan now exists in their list of development plans. | Performance Management |

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| Development Plan Cancellation Approval Requested | This email is triggered when a user attempts to cancel a development plan that has been approved and approval/cancellation approval is required. The approval setting is configurable by OU on the Development Plan Preferences page.  This email is sent to the user in the approver role. If no approver exists, the development plan is automatically cancelled and no email is sent. If the "Plans must be approved by" preference is not selected, this email does not fire. | Performance Management |

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| Development Plan Comment Added | This email is triggered when a comment is added to a user's development plan. This includes a comment added to the plan, a comment added to an objective, or when any comment receives a reply. This email is not triggered when the designated email recipient is the user who added the comment. For example, if the triggers is configured to send to the approver and the approver adds a comment to the plan, then this email is not triggered since the intended recipient is the one who added the comment. This email is available within the Performance Management action type, and it can be sent as a Notification to Dev Plan Approver or Dev Plan User.  The following tags are available for this email trigger:   * DEVPLAN.APPROVER.FIRST.NAME - This displays the development plan approver's first name. * DEVPLAN.APPROVER.LAST.NAME - This displays the development plan approver's last name. * DEVPLAN.TITLE - This displays the development plan title. * DEVPLAN.LINK - This displays a link to access the development plan. * DEVPLAN.USER.FIRST.NAME - This displays the development plan user's first name. * DEVPLAN.USER.LAST.NAME - This displays the development plan user's last name. * USER.FIRST.NAME - This displays the recipient's first name. * USER.LAST.NAME - This displays the recipient's last name. | Performance Management |

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| Development Plan Due Date Approaching | This email is triggered when a development plan is due. The user receives the email stating that they have a Development Plan due date approaching. Reminder emails can be set similar to other reminder emails. | Performance Management |

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| Development Plan Item Due Date Approaching | This email is triggered when a development plan item (either an action step or training item) is coming due. The user receives the email stating that they have a Development Plan item due date approaching. Reminder emails can be set similar to other reminder emails. | Performance Management |

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| External Reviewer Added | This email is triggered when an external user is added to a performance review.  The available recipients are Reviewee, Reviewer Selector (the reviewer who added the external reviewer), and External Reviewer (the external reviewer that was added to trigger the email). | Performance Management |

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| External User Assessment Task Assigned | This email is triggered when an external user is assigned as an assessor for a competency assessment task, and this may occur when an assessor is selected during the task configuration, when assessors are selected by a reviewee from within the competency assessment (when approval is not required), and when a selected assessor needing approval is approved. This email can be sent to Assessor(s) or a specific user.  Note: If this trigger is configured as a reminder, it acts as a reminder that the task is assigned. It DOES NOT act as a task due date reminder. | Performance Management |

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| Goal Approved | This email is triggered when a user submits a goal or requests to cancel a goal and the request is approved by the approver. | Performance Management |

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| Goal Assigned to You | This email is triggered when a goal is created and assigned to a user by anyone other than that user (i.e., this email is not triggered if you create a goal for yourself). The goal owner or goal owner's manager will receive an email stating that a new goal now exists in their list of goals.  The email can contain a link to the Goals page. | Performance Management |

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| Goal Cancelled | This email is triggered when a goal is cancelled by someone other than the goal owner. The email can be sent to either the goal owner or the goal owner's manager. If the goal owner cancels their own goal, the email is not triggered.   * The Goal Cancelled email does not fire to the user who initiated the goal cancellation or a user that approved the cancellation. For example, if the goal owner's manager is set as a recipient of this email, they do not receive the email if they cancel the goal of their subordinate. | Performance Management |

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| Goal Denied | This email is triggered when a user submits a goal or requests to cancel a goal and the request is denied by the approver. | Performance Management |

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| Goal Modification | This email is sent to the goal owner when their goal is modified by another user (e.g., manager, indirect manager). If the goal owner modifies their own goal, the email is not triggered. If only the goal comments or goal attachments are modified, the email is not triggered. | Performance Management |

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| Peer Approval Request | This email is triggered when a subordinate creates a peer. This email can be configured as a Notification or Reminder type email to alert the recipient that a approval has been requested for a peer. This email can be sent to User or User's Manager. | Performance Management |

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| Performance Review Co-Planner Added | This email is triggered when a co-planner is added to a performance review from within the performance review task by the reviewer OR added by an administrator via the View Details page (if the task is configured to allow reviewers to add co-planners).  The available recipients are Reviewee, Reviewer (the reviewer who added the co-planner), and Co-Planners. Selecting Co-Planners triggers a separate email to all users who are named as co-planners for the task.  For co-planners without access to email, tasks display "Co-planner" at the end of task name for easy identification. | Performance Management |

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| Performance Review Reviewer Commented | This email is triggered when a reviewer adds a comment as part of a discussion thread within an off-cycle performance review. Discussions cannot be part of a standard performance review task.  The available recipients are Reviewee, Reviewer (the commenting reviewer), and Comment Recipients. Selecting Comment Recipients triggers a separate email to all users who have visibility to the comment. For example, a private comment only triggers emails to the reviewee or the person to which the reviewee is replying. A public comment triggers emails to the reviewee and all reviewers. | Performance Management |

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| Performance Review Reviewer Declined | This email is triggered when a reviewer declines a review.  The available recipients are Reviewee, Reviewer (the declining reviewer), and Review Selector (the user that selects the reviewers. | Performance Management |

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| Performance Review Step Assigned | Performance review of a specific user assigned. This email is triggered when the task step is available for that user to review, which may be triggered by the employee hire date, the previous reviewer submitting the review, or the task assignment date. Note: When customizing this email for a self-review step, this email cannot be sent to "Reviewer" because the system considers this user the reviewee.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step.  This email trigger can be sent to external users. If the REVIEW.LINK tag is used in the trigger and is sent to an external reviewer, then the link takes external reviewers to an external review page that requires no login or validation. See External Reviewers for additional information. | Performance Management |

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| Performance Review Step Completed | The Performance Review Step Completed email is only sent to the reviewee regarding other reviewers in the same sequence (if there is any). It is not designed to send email to own reviewer or the person (self) who is completing the review.  This email is not sent to other Reviewers. | Performance Management |

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| Performance Review Step Due Date | This email is triggered when a performance review task is due. If this email is sent to the recipient group "Reviewer" then only the users that have received performance reviews will receive the email. This email is conditional so that it only includes the users who are in progress or have not started. Note: When customizing this email for a self-review step, this email cannot be sent to "Reviewer" because the system considers this user the reviewee.  This email can be set up as a reminder to go out before the due date. The reminder will not be sent to reviewers that have already completed the review.  The due date for performance review tasks is defined for each reviewer group on step 2 of creating a performance review task. This date is not necessarily the same as the task end date for it may occur before the task ends. Reviewers will not be locked out of the task on the task due date unless it is the same date as the task end date.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step.  Note: Email Digest emails do not include past-due notifications for optional or locked performance review steps after the step due date. | Performance Management |

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| Performance Review Step Reopened | This email is triggered when a performance review step is reopened in order to alert or remind the user that a performance step has been reopened. When configured, this email is triggered any time a step is reopened, whether it is done by a manager or administrator. This email can be sent to Reviewee, Reviewee's Direct Manager, Reviewee's Indirect Manager, Reviewer, or a specific user.  The REOPEN.STEP.COMMENT tag displays the Reason commentary that was provided when the review step was reopened.  The REVIEW.REOPENED.STEP.DUE.DATE email tag displays the due date of the performance review step that is reopened. If no due date is defined for the step, then "No Due Date Defined" is displayed.  The system verifies that the review step is still due prior to triggering the email, so if the review step is no longer due, then this email is not triggered.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step. | Performance Management |

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| Performance Review Task Assigned | This email is triggered when the task is assigned to a user. This email is not triggered for a self-review task. However, if the reviewer is specifically named as the recipient of the email trigger, the email is still triggered to that reviewer. For example:   * If the email trigger is configured to be sent to "Reviewee" and John Doe launches a review in which he is the reviewee, he does not receive the email because he launched the review task. * If the email trigger is configured to be sent to "John Doe" and "Reviewee" and John Doe launches a review in which he is the reviewee, he does receives the email because he is named as a specific recipient. | Performance Management |

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| Performance Review Task Completed | This email is triggered when a performance review task is completed (i.e., the overall performance review has been completed). This email can be set up as a reminder to go out at a certain time in relation to the completion of the task. The email can also be set up as a confirmation, notification, or promotional email.  This email can be sent to the reviewee, reviewee's manager, the reviewee's indirect manager, or a specific user.  Use Case: An administrator creates an Annual Performance Review task and would like all reviewees to be informed when the performance review has been completed. She configures the Performance Review Task Email to trigger on the date that the last step of the performance review task is due and sets the recipient as "Reviewee." | Performance Management |

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| Request Goal Approval | This email is a batch type email that includes a notification for each situation in which a goal owner does the following:   * Creates and submits a goal for themselves when approval is required. * Edits and resubmits a goal that has already been approved. * Attempts to cancel a goal that has been approved when approval is required.   This email is triggered when a user clicks the Send Approval Request button on the My Goals or Snapshot Goals page.  The email is sent to the user in the Approver role. If no approver is set or if goal approval is not required, the goal is automatically approved and no email is sent.  The email can contain a link to the Pending Goals page. | Performance Management |

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| Request Goal Approval | This email is a batch type email that includes a notification for each situation in which a goal owner does the following:   * Creates and submits a goal for themselves when approval is required. * Edits and resubmits a goal that has already been approved. * Attempts to cancel a goal that has been approved when approval is required.   This email is triggered when a user clicks the Send Approval Request button on the My Goals or Snapshot Goals page.  The email is sent to the user in the Approver role. If no approver is set or if goal approval is not required, the goal is automatically approved and no email is sent.  The email can contain a link to the Pending Goals page. | Performance Management |

Planning Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| WFP Not Implemented System Event Email | This email is triggered if an event occurring in Planning does not have an associated email action available. This email is a Notification type email. | Planning |

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| WFP Plan CoPlanners Changed | This email is triggered when the Co-Planners for a given plan are changed, whether that is adding or removing Co-Planners. The email i sent to User assigned as Primary Planner and Users assigned as CoPlanners (new).  The tags in this email reference the given plan, which is the recipient's plan. This email is a Notification type email. | Planning |

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| WFP Plan Created | This email is triggered to notify the user that the plan was created successfully. The email can be sent to User who created plan (owner). This email is configured as a Notification type email. | Planning |

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| WFP Plan Due Date Changed | This email is triggered when the Due date for a given plan is changed. The tags in this email reference the given plan, which is the recipient's plan.  The email is sent to User assigned as Primary Planner and Users assigned as CoPlanners. This email can be configured as a Notification type email. | Planning |

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| WFP Plan Primary Planner Changed | This email is triggered when the Primary Planner for a given plan is changed. The tags in this email reference the given plan, which is the recipient's plan.  The email is sent to User assigned as Primary Planner (new) and Users assigned as CoPlanners. This email can be configured as a Notification type email. | Planning |

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| WFP Subplan Accepted | This email is triggered when the Subplan is accepted by the parent planner. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email. | Planning |

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| WFP Subplan Assigned To CoPlanner | This email is triggered when the Subplan is accepted by the parent planner. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email. | Planning |

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| WFP Subplan Assigned To Primary Planner | This email is triggered a specific user when s/he is assigned as Primary Planner.  The email is sent to User assigned as Primary Planner in this event. This email can be configured as a Notification type email. | Planning |

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| WFP Subplan Rejected | This email is triggered when a subplan is rejected by Parent Planner. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email. | Planning |

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| WFP Subplan Submitted To Primary Planner | This emails is triggered as notification that a subplan was submitted and needs review. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as parent plan's primary planner. This email can be configured as a Notification type email. | Planning |

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| WFP Subplan Submitted | This emails is triggered as confirmation that a subplan was submitted for review. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email. | Planning |

Recruiting Emails

Note: The Offer Letter email action type is only available for portals with the Offer Letter Management functionality enabled.

Localization Note: For portals with multiple languages enabled, translated text displays in standard and custom emails, and localizable tags are localized. This allows emails to be received in the recipient's language and also allows email tags to display the translated values, when available. For example, if the job title is localized and included in the email, then the job title displays in the recipient's language. If the recipient's language is not available, then the job title displays in the language of the user who created or edited the job requisition.

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Add Applicant | This email is triggered when an applicant is added to a requisition from [**Manage Candidates**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Manage%20Candidates/Manage%20Candidates%20Page.htm), [**Candidate Search**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Candidate%20Search%20Query/Candidate%20Search%20Query%20Results%20-%20Actions.htm), [**Manage Applicants**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Manage%20Applicants%20-%20Add%20to%20Requisition.htm), or the [**Add Submission page of the Requisition Snapshot**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Add%20Submission.htm). This email can be sent to External Applicant, Internal Applicant, Applicant Reviewer(s), OU Approver, Hiring Manager, Requisition Owner(s). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case  Use this trigger to notify applicants or hiring managers when an applicant is added to a requisition. Applicants can be added to requisitions that they did not apply to from the View Requisition Details page. Applicants require this email as it includes a link to the requisition they were added to so that they can complete the application.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Configuration Note: When creating the Add Applicant email, be sure to include the PASSWORD.RESET.URL tag so that applicants who do not have a profile on the career site will have quick access to the password creation page. When applicants click the link, they are taken to a page for the career site that prompts them to define a password. | Recruiting |

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| Agency Submission Confirmation | This email is triggered when a Recruiting Agency submits an applicant. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner, Requisition Reviewer, Responsible Recruiting Agent, or a specific user.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to owners, reviewers, or recruiting agency users that a Recruiting Agency submitted an applicant to a requisition. | Recruiting |

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| Applicant Review Feedback Received | This email is triggered when feedback for an applicant is submitted from the Resume/CV Review page. The email can be sent to Requisition Owner(s). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment t action type section of Email Management.  Use Case: An applicant reviewer access the Resume/CV Review page to review applicants. She clicks the Advance button , and then she submits her decision. This will trigger the "Applicant Review Feedback Received" email, provided that it is active and configured in Email Management. | Recruiting |

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| Applicant Status Change | This email is triggered when an applicant's status changes. The Applicant Status Change email must be defined for the associated status in order to trigger. When the email is sent, the recipient will receive the email in their language, if available for the portal. Note: The email is defined by the administrator or recruiter when configuring the requisition template or job requisition, respectively.  The email can be sent to Applicant Interviewer(s), Applicant Reviewer(s), External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Frequently Asked Questions  How do I define a status change email for the associated applicant status?  Status change emails can be selected for each applicant status on the Applicant Review tab in requisition templates and the default requisition template, as well as when creating and editing job requisitions. See Status Change Emails. | Recruiting |

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| Application Confirmation | When an applicant submits an application, a notification email can be sent to External Applicant, Hiring Manager, Internal Applicant, or Requisition Owner.  This email also applies to applications submitted via a mobile device. For mobile submissions, the email may be triggered multiple times, depending on the number of times the application is submitted. For example, if the applicant submits a partially completed application from their mobile device, and then completes and submits the application from a desktop device, the Application Confirmation email is sent both times the application is submitted.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send confirmation emails to applicants after they successfully complete an application. | Recruiting |

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| Application Confirmation - As Guest | This email is triggered when a user submits an application as a guest. The email can be sent to External Users, Hiring Manager, or Requisition Owner. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The email can include a PASSWORD.RESET.URL tag so that applicants can define a password on the career site for their profile.  Apply as Guest Applicants and Creating Accounts on Mobile-Friendly Career Sites  The Application Confirmation - As Guest email is important to configure for mobile-friendly career sites. When configured and active, all applicants who apply to jobs on mobile-friendly career sites via the Apply as Guest feature will be sent the Application Confirmation - As Guest email, even if they haven't created an account.  This provides applicants with a path back to the career site so that they can create an account.  Claiming an Account  When an applicant who has applied as a guest returns to the career site for the first time to check the status of their application (take an assessment, schedule an interview, etc.) they have two options:  Option 1: Create an account. Because they applied as a guest, most likely they will create a new account with the same email from their application because they have not done this yet. When they create an account, the system will automatically sync their previous application be to their newly claimed account. Their profile will display any previous applications tied to the email address they used to create their account.  Option 2: Go through the forgot/create password flow. If a user remembers that they applied as a guest but did not create a password, then they can trigger the reset password workflow by clicking the Forgot Password link. This will also allow them to create a new password, and then log in to their portal and see all previous applications. | Recruiting |

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| Assign Applicant Assessment | When an assessment is assigned to an applicant, a notification email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, or Requisition Owner.  Use Case: Use this trigger to send emails to applicants when they are assigned an assessment. The email can include a link to the job application so that the user can easily take the necessary next steps.   * When sent to an external user, the assessment link tag displays as a deep link to the Login/Self Registration page for the career site. After successful login, the user is presented with the assessment immediately. * When sent to an internal user, the assessment link tag displays as a text string: "Navigate to your Transcript to complete this assessment." | Recruiting |

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| Assign Applicant Training | When training is assigned to an applicant, a notification email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, or Requisition Owner.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send emails to applicants when they are assigned training. The email can include a link to the job application so that the user can easily take the necessary next steps.   * When sent to an external user, the training link tag displays as a deep link to the Login/Self Registration page for the career site. After successful login, the user is presented with the training immediately. * When sent to an internal user, the training link tag displays as a text string: "Navigate to your Transcript to complete this training." | Recruiting |

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| Assign Integration Assessment | This email is triggered when an Edge integration assessment is assigned to an applicant, such as a WOTC assessment. This email can be configured as a notification or a reminder, and it can be sent to External Applicant, Internal Applicant, OU Approver, Hiring Manager, OU Approver, or a specific user.  This email only triggers when a successful response is received from the vendor.  Note: The APPLICANT.INTEGRATION.ASSESSMENT.LINK tag must be included in the email. This tag provides a link that the applicant can click to access the assessment.  Note about Auto-Assignment of Pre-Employment Verifications: This email also applies to auto-assignment of pre-employment verifications, via the Automated Candidate Progression (Early Adopter) functionality. For more information, see [**Feature Activation Preferences**](file:///C:/cornerstone-csx-online-help/Content/Preferences/Recruiting%20Preferences/Feature%20Activation%20Preferences.htm). | Recruiting |

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| Background Check Assigned | This email is triggered when a background check is assigned to an applicant. This assignment is dictated by successful assignment in the vendor integration and not solely by clicking the Assign link for a background check. This email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to applicants when they are assigned a background check to complete. | Recruiting |

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| Background Check Complete | This email is triggered when a background check is completed. This assignment is dictated by successful completion of the background check in the vendor integration. This email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to recruiters when a background check is complete. | Recruiting |

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| Candidate Hired | This email is triggered when a candidate's applicant status is changed to Hired. The email can be sent to Requisition Owner, Hiring Manager, Next Level Hiring Manager, or a specific user.  Use Case: Use this trigger to notify recipients that a candidate's applicant status has been changed to Hired. This status change indicates that a hiring decision has been made.  Note: Offer letter related tags are only populated in the email if the offer letter has been accepted. | Recruiting |

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| Candidate Offer Response Received | This email is triggered when a candidate response is recorded for a candidate. The email can be sent to Requisition Owner, Hiring Manager, Next Level Hiring Manager, or a specific user.  Use Case: Use this trigger to notify recipients that a candidate response has been recorded for a candidate. This email can also be triggered when a user manually records a response for the candidate from the Offer Letter Management table or when the candidate responds to an offer letter from their My Profile page. | Recruiting |

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| Connect With Us New User | This email is triggered when a user submits their information via Connect With Us. The email can be sent to External Users. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment t action type section of Email Management. | Recruiting |

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| Disposition | When an applicant is passed on, a notification or reminder email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner, or Requisition Reviewer.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to applicants when they are passed on for consideration. The trigger can be configured as a reminder to delay response back to the applicant as necessary. | Recruiting |

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| Email Applicant | When a user manually emails an applicant, a notification can be sent to External Applicant or Internal Applicant. This email can be triggered from the Manage Applicants or Application Profile page.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  The EMAIL.CUSTOM.MESSAGE tag can be included as a placeholder in the email. The tag will be replaced by the text in the Custom Message field when emailing applicants via the Send Email from Template action on [**Manage Applicants**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Manage%20Applicants%20-%20Send%20Email.htm) or the [**Application Profile page**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Applicant%20Profile%20Page%20-%20Summary%20Tab.htm).  Note: When including the EMAIL.CUSTOM.MESSAGE tag, a carriage return is automatically included at the end of the message that replaces the tag. If you do not want an extra line between the end of the custom message and the rest of the email, place the EMAIL.CUSTOM.MESSAGE tag directly next to the text that follows the custom message.  Note: If you do not include the EMAIL.CUSTOM.MESSAGE tag, the ability to add a custom message is not available when sending a template email from the Applicant Profile page.  Use Case: Use this trigger when sending ad hoc emails to applicants. Ad hoc emails can be sent from the Manage Applicants or Applicant Profile pages. Emails can be sent to one applicant or a batch of applicants. | Recruiting |

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| Email Offer to Candidate | This email is triggered when an offer is emailed to a candidate. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Next Level Hiring Manager, or a specific user.  Use Case: Use this trigger to send an offer letter to a candidate. This trigger can also be used to notify other users that an offer letter has been sent to the candidate. Note: If the offer letter is attached to the email as a PDF, any other attachments added during the [**Send to Candidate**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Offer%20Letter%20Workflow%20-%20Send%20to%20Candidate.htm) workflow step are also added to the email as attachments. | Recruiting |

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| Integration Assessment Assignment Status | This email is triggered to notify recruiters and hiring managers when an error is received from the vendor during assignment of an integration assessment. This allows recruiters to learn about the error quickly so they can manually re-assign the integration assessment on the Manage Candidates page or automatically by re-adding a candidate to the Assessment Status. The new email is sent if there is an error with a manual or auto-assignment of the integration.  Note: The APPLICANT.INTEGRATION.NAME tag must be included in the email. | Recruiting |

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| Integration Assessment Completed | This email is triggered when an applicant has successfully completed their custom integration task via their My Profile page in the career site or the assessment via the email link. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, and Requisition Owner. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management. | Recruiting |

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| Interview Cancelled Notification | This email is triggered when an interviewer is removed from an interview session or when an interview session is cancelled. The email can be sent to Applicant Interviewer(s) or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  This email is used when sending Outlook Meeting Invite cancellations. The email contains an ICS attachment if an ICS attachment has already been created for the interviewer or for the session being cancelled.  Use Case: When an interviewer needs to be removed from an interview session or if an interview session needs to be cancelled, this email trigger is sent in order to notify the interviewer of the cancellation.  Best Practice: It is a best practice to include the COMMENTS.TO.INTERVIEWER tag in the email. This tag will show recipients any comments that the interview scheduler included when cancelling the interview. If this tag is not present in the email, and the interview scheduler entered a comment when cancelling the interview, then the comments will not appear in the email to recipients.  Interview Manager Note: The [**Interview Manager page**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Interview%20Manager/Interview%20Manager%20Overview.htm) is automatically enabled for interviewers. If the interviewer is removed from an interview, the Interview Manager page is no longer visible. Any comments regarding the interview are no longer accessible to the interviewer. | Recruiting |

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| Interview Recommendation Nudge | This email is triggered when a user selects the Nudge Interviewer link from the Options column on the Interview Manager page. The email can be sent to Requisition Owner(s), Applicant Interviewer(s), Hiring Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Recruiters may want to nudge interviewers when they have not completed their recommendation for an interview. Use this email trigger to notify interviewers that they need to complete their interview recommendation. | Recruiting |

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| Interview Recommendation Pending | This email is triggered when an interview recommendation is pending a response from an interviewer. The email can be sent to Requisition Owner(s), Applicant Interviewer(s), Hiring Manager, or a specific user. This email can be configured as a Notification or Reminder type email. For Reminder type emails, the reminder is triggered a set number of days, hours, or minutes after the initial interview request is sent. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Use this trigger to send notifications to interviewers when an interview is pending their recommendation. Administrators may want to configure this trigger to fire automatically as a notification or reminder to interviewers to complete their interview recommendations. | Recruiting |

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| Interview Recommendation Recorded | This email is triggered when an interview recommendation is recorded by the interviewer. The email can be sent to Requisition Owner(s), Applicant Interviewer(s), Hiring Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management. Note: This email fires when recommendations are recorded either in Cornerstone or HireVue for video interviews.  Use Case: Recruiters and Hiring Managers may want to see when an interview recommendation is recorded for an interview. Use this email trigger to send updates whenever a recommendation in recorded for an interview. | Recruiting |

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| Interview Scheduling Notification - Applicant | This email is triggered when an applicant scheduling notification is sent to the applicant, and is also triggered when an applicant self scheduled an interview for an interview event. The email can be sent to External Applicant, Internal Applicant, or a specific user. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: When a recruiter schedules an interview, they may want to send a notification to the applicant about the scheduled date, time, and interview type. Use this trigger to notify the applicant that an interview session is scheduled. | Recruiting |

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| Interview Scheduling Notification - Interviewer(s) | This email is triggered when an interview scheduling notification is sent to interviewers. The email can be sent to Applicant Interviewer(s) or a specific user. This email can be configured as a Notification or Reminder type email. For Reminder type emails, the reminder is triggered a set number of days, hours, or minutes before the interview start time. This email is active by default and can be found in the Recruitment action type section of Email Management.  This email is used when sending Outlook Meeting Invite requests. The email contains an ICS attachment if Outlook notifications are enabled by the administrator in Interview Management Preferences.  This email is used when using Outlook Scheduler to preview the email, if the Outlook scheduling option is enabled by the administrator in Interview Management Preferences.  Use Case: When a recruiter schedules an interview, they may want to notify the interviewers about the scheduled date, time, and interview type. Use this trigger to notify the interviewers that an interview session is scheduled. | Recruiting |

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| Interview Scheduling Response | This email is triggered when a scheduling response is recorded from Outlook. The email can be sent to Requisition Owner(s), Applicant Interviewer(s), Hiring Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  This email is used when Outlook Meeting Invite requests are accepted or denied. The email only fires when the recipient responds with either Accept, Tentative, or Decline. If the recipient responds with Tentative, then the response is treated as a decline. Note: The option to accept or decline a meeting invite is a standard feature in Outlook. This email fires when the recipient clicks either the Accept or Decline button in the invite.  Use Case: Owners and hiring managers may want to be updated when an interview request response is recorded in Outlook. Use this email trigger to send notifications to recruiters when a response is recorded in Outlook. | Recruiting |

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| Invitation to Apply | This email is triggered when an invitation to apply is sent. The email can be sent to Requisition Owner, Requisition Reviewer, Hiring Manager, Invitation Recipient, or a specific user.  Use Case: Use this trigger to send invitations to apply to applicants who have not completed an application or who were found during an applicant search.  Note: The APPLICANT.STATUS, APPLICANT.STATUS.CHANGE.DATE, APPLICATION.DATE, and APPLICATION.REVIEW.LINK tags are not available for this email trigger. | Recruiting |

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| Invitation to Interview Event (Applicant Self Schedule) | This email is triggered when a recruiter sends a self schedule invitation to an applicant for an interview event. The email can be sent to Applicant, Hiring Manager, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Use this email to send a message to the applicant regarding self scheduling an interview event. With this link, the applicant can schedule themselves into an interview event. | Recruiting |

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| Job Alert | This email is triggered when a requisition is posted that meets an internal or external applicant’s job alert criteria. This email can be sent to Alert Recipient (Internal) or Alert Recipient (External). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  For external recipients who elect to receive daily job alerts, the job alerts are sent at 1:00am PST each day but only if there is at least one open requisition that meets the criteria the applicant defined for the job alert. Note: If a requisition opens and closes in the same day, the closed requisition is not included in the daily job alert.  For external recipients who elect to receive weekly job alerts, the job alerts are sent each week at 1:00am PST beginning one week from the date on which the job alert is created. However, the email is only triggered if there is at least one open requisition that meets the criteria the applicant defined for the job alert.  Use Case: Use this trigger to send job alerts to internal and/or external applicants, informing them of open requisitions that match their job interests. For external recipients, the email is triggered on either a daily or weekly basis, depending on how the external applicant configures the job alert on the career site. For internal recipients, the email is triggered immediately when a job, for which the user has expressed an interest, is posted to Career Center, provided the user meets the availability criteria for the requisition. | Recruiting |

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| Merged Duplicate Applicants | This email is triggered when a duplicate applicant is merged under a target profile. The email can be sent to Hiring Manager, Merged Applicant, Requisition Owner(s), Target Applicant (this is defined as the applicant with whom the merged applicant is merged), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruiting action type section of Email Management.  Use Case: Use this trigger to send notifications that duplicate applicant profiles have been merged and that all merged applications are compiled under the target profile. | Recruiting |

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| New Applicant Comment Posted | When a user posts a new comment for an applicant, a notification email can be sent to Requisition Owner, Hiring Manager, OU Approver, or Applicant Reviewers.  Use Case: Use this trigger to send notifications to users who are interested in receiving emails when new comments are posted for applicants. Reviewers may want to see what other reviewers are commenting about an applicant. | Recruiting |

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| New Profile Creation | When a user creates a new applicant profile, a notification email can be sent to User. This trigger is used to inform applicants that they created a new profile. Note: This trigger only works for profiles created from the Create Profile page and does not trigger emails when applicants use LinkedIn or other 3rd party profile generation tools.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Use Case: Use this trigger to send emails to applicants to confirm that they created a new applicant profile. This trigger could be used to drive applicants back to a Career Site after they create a profile. | Recruiting |

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| Offer Approval Decision | This email is triggered when an approver records an approval decision for an offer. The email can be sent to Requisition Owner, Hiring Manager, Next Level Hiring Manager, or a specific user.Use Case: Use this trigger to notify recipients that an offer letter approval decision has been made by an approver. | Recruiting |

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| Offer Pending Approval | This email is triggered when an offer requires approval. The email can be sent to Next Approver, Requisition Owner, Hiring Manager, Next Level Hiring Manager, or a specific user.  Reminder emails are triggered when an offer that requires approval has not been responded to by the approver. The email continues to fire based on the interval configured for the reminder.  Use Case: Use this trigger to notify recipients of an offer that requires their approval. It is possible (and likely) to send multiple emails using this trigger at multiple times.   * If the approval workflow utilizes sequential approval by multiple recipients, then the email is sent to the next approver only after the previous recipient approves the offer. * If the approval workflow utilizes concurrent approval by multiple recipients, then the email is sent to all recipients within a tier simultaneously.   Use Case: Use this trigger to remind recipients of an offer that requires their approval. It is possible (and likely) to send multiple emails using this trigger at multiple times.  Note: If the recipient is "Next approver(s) if offer is pending" and there is at least one approver who is configured on the offer letter as "Approver," then the Offer Pending Approval email is only sent to the "Next approver(s) if offer is pending" recipient. This means that users who are defined as "Notification-Only Approver" on the offer letter will not also receive this email. | Recruiting |

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| Onboarding Notifications | This email is triggered when the Send button is clicked in the Send Onboarding Notifications pop-up from the Applicant Profile page. This email can be sent to External Applicant, Hiring Manager, Internal Applicant, Next Level Hiring Manager, Requisition Owner(s), Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to notify the applicable personnel of a new hire's start date to ensure that the necessary provisions will be provided in preparation for beginning employment.  Use Case: When a hiring manager brings on a new person in a Sales position, the recruiter needs to work with a number of different groups within the organization to prepare for the new employee’s first day. At the very least, this involves six departments and personnel, including the following:   * The Technology team needs to provision a new computer and telephone. * The Facilities team needs to ensure building access and parking for the new employee, as well as a clean workspace. * Human Resources needs to distribute new hire materials and gather personnel information. * Finance needs to set up accounts for the new employee. * The Training team needs to register the employee for trainings. * The new hire’s manager should be notified of the start date and should be prompted to prepare for the new employee’s arrival.   By configuring emails to be sent to each of these departments and personnel, the hiring manager can ensure that all pertinent parties are notified of their responsibilities well in advance of the employee's start date.  Best Practice: It is a best practice to provide a clear title for each email template. Typically, this email is only sent by recruiters who do not have access to Email Management from which to view the email content. Recruiters select one or more of the email templates from the Applicant Profile page, but they are not able to preview the email before sending it. Providing a clear title for each email helps recruiters know which template(s) are appropriate to select when sending onboarding notifications. Without a clear title, recruiters may send the wrong emails and fail to notify the appropriate personnel about upcoming new hires. | Recruiting |

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| OnDemand Video Interview Assigned | This email is triggered when an On Demand Video Interview is assigned to an applicant. The email can be sent to Applicant Interviewer(s), External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to applicants when they have been assigned an On Demand Video interview. This email may include a link for the user to complete their video interview, if the appropriate tag for the link is included in the body of the email. | Recruiting |

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| OnDemand Video Interview Completed | This email is triggered when an applicant completes an On Demand Video interview. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Applicant Interviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to requisition owners and interviewers when an applicant completes an On Demand Video interview. Interviewers may want to use this email trigger as a notification to let requisition owners and interviewers know when to review an applicant’s submitted video interview. | Recruiting |

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| Referral to External User | This email is triggered when a user refers a requisition in the [**internal career site**](file:///C:/cornerstone-csx-online-help/Content/User/Recruiting/Internal%20Career%20Site/Internal%20Career%20Site%20Refer%20Candidates.htm) or [**Career Center (Legacy)**](file:///C:/cornerstone-csx-online-help/Content/User/Succession/Career%20Center%20-%20Refer%20Jobs.htm). The email can be sent to Hiring Manager, Referral Recipient, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section in Email Management.  Note: A custom message can be added by the sender. In order for a custom message to appear to the recipient, the EMAIL.CUSTOM.MESSAGE email tag must be included when [**configuring the email in Email Administration**](#_Ref-1964427258). | Recruiting |

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| Referral to Internal User | This email is triggered when an employee refers a requisition via email to another employee. The email can be sent to User, Referral, or a specific user. | Recruiting |

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| Reminder to Apply | This email is triggered when an applicant expresses interest in a job by creating a job alert. The email reminds applicants to apply for the job after creating a job alert for the requisition. The email displays to the applicant in the applicant's browser language.  The content of the email is as follows:   | Email Field | Content | | --- | --- | | Subject | Reminder to Apply - [Position Name] | | From Address | [System default email address that displays in the From field for emails in Email Management] | | Message | Thank you for your interest in the <b>[Display Job Title]</b> position at <b>[Organization Name]</b>. In order to be considered for this position, please submit an application by clicking on the link below.  [Position Name] Apply Now <br/>  Thank you.  [HTML version of External Job Details page]  Note: The link to apply to the requisition is unique to the applicant and the source from which the applicant arrived at the career site. Clicking the [Position Name] Apply Now link opens the Job Details page on the same career site for the requisition from which the applicant created the job alert. |   Use Case: An administrator activates the Reminder to Apply email in Email Management to ensure that applicants are reminded to apply to job requisitions for which they express interest. | Recruiting |

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| Requisition Approval Final Status | This email fires when a final approval or denial decision is reached for a requisition that is pending approval. The email is used to send notifications about the final status of a requisition to the requisition owner, reviewer, and other users. The email can be sent to a specific user or the role of Requisition Owner, Hiring Manager, or OU Approver.  Use Case: A hiring manager would like to be informed when a requisition for which they are an approver is approved or denied. The administrator configures the Requisition Approval Final Status email to be sent to the hiring manager when the requisition has a final approval or denial status. | Recruiting |

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| Requisition Closed/Cancelled | This email is triggered when a requisition is closed or cancelled. The email can be sent to Requisition Owner, Requisition Reviewer, Hiring Manager, Recruiting Agencies, Active Applicants, or a specific user. Note: Sending to Recruiting Agencies includes the email address that is associated with the default user defined for the agency by the administrator.  The Availability setting for this email can be configured so that the emails trigger for external candidates.  Use Case: Use this trigger to send notifications to owners, reviewers, or recruiting agency users that a requisition has been closed or cancelled. | Recruiting |

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| Requisition Pending Approval | When a requisition requires approval, a notification or reminder email can be sent to Next approver if requisition is pending, Requisition Owner, or Hiring Manager.  When configured as a reminder email, the emails are triggered when the approver has not yet submitted an approval decision for a requisition by the time the reminder time has elapsed. The email continues to fire based on the interval configured for the reminder.  Use Case: Use this trigger to notify recipients of a requisition that requires their approval. It is possible to send multiple emails using this trigger at multiple times.   * If the approval workflow utilizes sequential approval by multiple recipients, send email to next approver only after previous recipient approves the requisition. * If the approval workflow utilizes concurrent approval by multiple recipients, send email to all recipients within a tier simultaneously.   Use Case: Use this trigger to remind approvers repeatedly that they have one or more requisitions pending approval. The reminder helps to ensure that requisitions are approved in a timely manner. | Recruiting |

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| Requisition Posted to Agency | This email notifies recruiting agencies that a new requisition has been posted. This email can be sent to Recruiting Agencies, Hiring Manager, Requisition Owner(s), and Requisition Reviewer(s). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment t action type section of Email Management.  Note: This email will fire each time the Post button is clicked in the Recruiting Agencies section of the [**Edit Postings page**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Job%20Posting%20Page.htm), even if there are no changes to the postings for the agencies that are listed. For example, a requisition is posted to Agency A. The next day, the same requisition is posted to Agency B. Agency A will receive the Requisition Posted to Agency email both times the requisition is posted. | Recruiting |

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| Requisition Posted | This email is triggered any time a requisition moves to the Open status, regardless of whether or not the requisition is being posted at that time to any career sites, job boards, etc. The email can be sent to Requisition Owner, Requisition Reviewer, Hiring Manager, or a specific user.  Open Status Note: If there is no approval workflow, a requisition moves into an Open status immediately upon submission. If there is an approval workflow, the requisition moves into an Open status when the approval workflow is completed.  Use Case: Use this trigger to send notifications to owners, reviewers, or recruiting agency users that a requisition has been posted. This trigger will also send notifications when a requisition is edited and re-opened. | Recruiting |

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| Requisition Request Response | This email is triggered when a requisition request is accepted or declined. The email can be sent to Request Reviewer(s), Requester, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Hiring managers would like to be notified when a reviewer responds to their requisition request. This email is used by hiring managers to view the response to their requests. | Recruiting |

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| Requisition Request Submitted | This email is triggered when a requisition request is successfully submitted. The email can be sent to Request Reviewer(s), Requestor, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Requisition reviewers would like to be notified when a hiring manager submits a requisition request. This email is used by reviewers to know when they have a request to review. | Recruiting |

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| Review Applicant | This email is triggered when an applicant is moved into a Review status type. The email is also triggered when a new reviewer has been added, and the applicant is already in a Review status type.  This is a Notification type email and can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner, or Requisition Reviewer.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  When configuring this email, you can include the REVIEW.APPLICANT.RESUME.LINK tag. This tag displays the applicant's full name as a link that opens the Resume/CV Review page.  Use Case: Use this email to send notifications to reviewers and hiring managers when an applicant is ready to be reviewed. | Recruiting |

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| Review Applicant Daily Summary | This email provides applicant reviewers with a daily summary of applicants who have been moved to the first instance of the status type of Review, whether for open or closed requisitions. In addition, a new email tag is added.  This email is triggered once a day at 5:00pm GMT. This email only fires if there is at least one applicant who has been moved into the first instance of the Review status type for a requisition during the past day.  This email can be sent to Applicant Reviewer and cannot be carbon copied. This email can only be configured as a notification type email and is active by default.  Note: This email is only available to users with permission to review requisitions.  Use Case: An executive is an Applicant Reviewer for several open requisitions within a corporation. The executive currently receives one email for each applicant who is moved to the first instance of a Review status type for each requisition for which the executive is an applicant reviewer. This results in a large quantity of emails. Instead, the executive would like to receive one email daily that lists all applicants who have been moved into the first instance of the status type of Review for all of the requisitions for which the executive is listed as a reviewer.    Implementation Note: A status type of Review must be active in Applicant Statuses in order for the Review Applicant Daily Summary email to trigger. The email must also be configured and active in Email Management.  Email Tag SSO Note: The REVIEW.APPLICANT.RESUME.SUMMARY email tag is SSO enabled. Hiring managers can click the link and access applicants without having to log in to the portal. For organizations that do not use SSO, hiring managers will be directed to the custom login page. | Recruiting |

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| Send Offer to Candidate Profile | This email is triggered when an offer is sent to a user's candidate profile. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Next Level Hiring Manager, or a specific user.Use Case: Use this trigger to notify a candidate that they have an offer letter pending approval in their candidate profile. This trigger can also be used to notify other users that an offer letter has been sent to the candidate. | Recruiting |

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| SHL Assessment Assigned | This email is triggered when an SHL assessment is assigned to an applicant. One email is sent per assessment, even if there are multiple assessments in the same application workflow. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner(s), or a specific user. This email can also be sent to a specific job role, which includes Hiring Manager, OU Approver, and Requisition Owners(s). This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: An applicant begins an application and requests an assessment. The applicant does not finish the assessment. At a later date, the applicant needs a way to return to assessment. The applicant can access the Assessment Assigned email that includes a link to their applicant profile for the specific position. | Recruiting |

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| SHL Assessment Complete | This email is triggered when an SHL assessment is completed by an applicant within the vendor integration site. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Hiring managers would like to be notified when an applicant has completed an assessment so that they can view the assessment results on the Manage Applicants page.  Note: Once the applicant submits the application, if the assessment completion email is configured for the portal, then the email is triggered for each completed assessment in the application. A single completion email is not sent for all of the assessments in an application. | Recruiting |

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| Submission Accepted as Applicant | This email is triggered when a submission is accepted as a qualified applicant, which is also known as the point at which the submission receives a candidate date in the database. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner, Requisition Reviewer, Responsible Recruiting Agent, or a specific user.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to owners, reviewers, or recruiting agency users that a submission was accepted into the Applicant pool for a requisition. The accepting of a submission indicates that the submission is a qualified applicant and may trigger cost updates for the Recruiting Agency. | Recruiting |

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| Today’s Scheduled Interviews | This email is triggered at the beginning of each day and provides a list of the interviews that are scheduled for the day on which the email is triggered. The email can be sent to Applicant Interviewer(s). This email can be configured as a Notification type email. This email is sent at 5 a.m. each day if the email is active, but the email is only sent to interviewers who have one or more interviews scheduled for the day on which the email is sent. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Use this trigger to send notifications to owners and interviewers when they have interviews scheduled. Interviewers and recruiters may want to a full day summary of all interviews that they have scheduled for the current date. | Recruiting |

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| Voluntary Withdrawal | This email is triggered when an applicant voluntarily withdraws their submitted application. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner, Requisition Reviewer, Responsible Recruiting Agent, or a specific user.Use Case: Use this trigger to send notifications to owners and reviewers when an applicant chooses to withdraw from an application. Administrators may also want to send a confirmation email to the applicant after they have withdrawn their application.  Note: See the Overview topic in the Agency Portal section of Online Help for more information about the Responsible Recruiting Agent role. See Agency Portal Overview. | Recruiting |

Self Registration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Activation Email | This email is sent to users who submit a registration for a self-registration group that requires email verification. To include a link that the user will click to verify their email address for the self-registration, the following tag must be included in the body of the email: EMAIL.VERIFICATION.LINK  This tag will update with the self-registration email verification link automatically when the user receives the email. | Self Registration |

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| Deny User Record | This email is triggered by the user record approver denying a record. | Self Registration |

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| User Approve Record | This email is triggered when a self-registered user record is approved. If self-registration user records do not require approval, then this email is triggered immediately. If approval is required, then this email is triggered when the user record is approved. This email can be sent to User, User's Approver, or User's Manager. | Self Registration |

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| User Record Request | This email is triggered by a self-registered user submitting their user record for approval. | Self Registration |

Skills Feedback Requested

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Skills Feedback Requested | This email is triggered when a user requests skills feedback. This email can be configured as a reminder or a notification, and it can be sent to Rater (the person whose feedback is requested), Requester (the person requesting the feedback), or a specific user.  The following tags are available for this email trigger:   * PreviewTargetUsers - This displays the names of the target users who are pending responses within the request, up to three users. * TargetUserCount - This displays a count of how many users are pending feedback in the request. * PreviewRatedCapabilities - This displays the names of the skills that are pending feedback in the responses, up to three skills. * CapabilitiesCount - This displays a count of all of the skills that are pending feedback in the request. * RequestsLink - This includes a link to the skills feedback request. * RequestName - This displays the name of the request. * RequesterName - This displays the name of the person requesting feedback. | Skills Feedback |

Succession Management Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Succession Task Assigned | If this email trigger is active when the SMP task is saved, an email is sent to the selected recipients. This email trigger can be sent to the SMP task recipient or a specific user. | Succession Management |

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| Succession Task Due | This email is triggered when a Task Owner step is due. This email is not triggered by the overall succession task becoming due. This email will still fire even if the task owner has already completed their SMP task. This email can be sent to the SMP task assignee or a specific user. | Succession Management |

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| Succession Task Pdf Notification | This email is triggered when the PDF that is requested from either within a Succession task or from the Scheduled Tasks page is ready to be downloaded. The email includes a link to the PDF so that users can open the PDF directly from the email. If you modify this email, be sure to keep the PDF.LINK tag in the body of the email.  The email can be sent to Requester or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Succession Management action type section of Email Administration. | Succession Management |

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| Succession Task Step Due | This email is triggered when a step (including a Review step) of a Succession Planning task is due. This email can be triggered as a notification or reminder to Assignee or a specific user. | Succession Management |

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| Talent Conference Re-Scheduled | This email is triggered when a talent conference location, date, or time is modified and the talent conference is saved. This email is intended to inform moderators and reviewers of the updated location, date, or time of the talent conference. This email trigger also has a calendar meeting request file attached, which can be saved to the recipient's calendar tool. This email can be sent as a notification to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task.  The following unique tag is available for this email trigger:   * COMMENTS.TO.REVIEWER - This displays any comments that were entered by the moderator for the reviewer on the Talent Conference step of the task. | Succession Management |

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| Talent Conference Scheduling Notification | This email is triggered when a talent conference is scheduled on the Talent Conference step of a Talent Conference succession task. This email is intended to inform moderators or reviewers of the talent conference location, date, and time. This email trigger also has a calendar meeting request file attached, which can be saved to the recipient's calendar tool. This email can be sent as a notification or a reminder to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task.  The following unique tag is available for this email trigger:   * COMMENTS.TO.REVIEWER - This displays any comments that were entered by the moderator for the reviewer on the Talent Conference step of the task. | Succession Management |

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| Talent Conference Summary Sign Off | This email is triggered when a talent conference is signed off. This email trigger enables moderators to notify reviewers that the Sign Off step is completed. This email can be sent as a notification to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task. | Succession Management |

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| Task Review Assignment Notification | This email is triggered when a user is assigned a Task Review step of a Succession Planning task. Note: A Task Review step is assigned when a Task Owner time period expires. This email can be triggered as a notification or reminder to Assignee or a specific user. | Succession Management |

System Administration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Admin Password Change | This email is triggered when an administrator manually resets a user's password. The user's new password cannot be included in the email. Because of this, the administrator must communicate this password outside of the system. This email can be sent to User or User's Manager. | System Administration |

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| Effective Dating Error | This email is triggered when a user record change that was set with a future effective date attempts to process and an error is generated. The email can be sent as a notification to User, User's Manager, User's Approver, or a specific user.  The EFFECTIVE.DATING.ERROR.DESCRIPTION tag can be included in the email message to include the description of the effective dating error. If there are multiple errors, then each error description is displayed on its own line in the message. | System Administration |

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| Forget Password | If the Password Reset Option in Password Preferences is set to Reset By Email Notification, then the Forget Password email is triggered when a user clicks Forgot Password? on the Login page. This email can be sent to External User or Internal User. If the user clicks Forgot Password? multiple times and a password reset URL is included in the email, then a new URL is generated for each email and the previous URL is no longer valid.  This email must be configured for administrators to select the "Send Password Reset Email to user's email address" option when resetting a user's password on the Admin - Users page.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Defining Availability  The availability settings do not apply to external users when External User is added as a recipient in the Send To field.  When Internal User is added to the Send To field, the availability settings defined in the Availability field apply to internal users based on the organizational unit (OU) to which they belong. The following rules apply by OU:   | Organizational Unit | Rule | | --- | --- | | Cost Center | Cost Center if user is part of the Cost Center | | Custom Group | Custom group if user is part of the Custom Group | | Division | Division user belongs to | | Grade | Grade user belongs to | | Location | Location user belongs to | | Position | Position user belongs to | | Self-Registration Group | Self-Registration group if user is part of the group | | User | User if user is added individually | | System Administration |

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| LAT Draft Review | This email is triggered when a learning assignment draft is created, and the following are true:   * The High User Count threshold is exceeded * The Restrict Submission setting is enabled * The administrator who created the draft does not have permission to submit the draft   This email is triggered an additional time if an administrator edits and saves the same draft if all of the criteria are still true.  Example 1: Administrator A creates a draft assignment with a user count that is above the High User Count threshold, but the Restrict Submission setting is disabled. The email is not triggered.  Example 2: Administrator A attempts to create a learning assignment that exceeds the High User Count threshold, and the Restrict Submission setting is enabled. Administrator A does not have permission to submit draft assignments. Administrator A receives the High User Count restriction and the can only save the assignment as a draft, and this triggers the LAT Draft Review email.  This email can be configured to be sent to Draft Reviewers or specific users. When this email is sent to Draft Reviewers, this includes all administrators who have the Assignment Tool - Submit Draft permission regardless of permission constraints. Administrators may further restrict the recipient list by adding specific users or by restricting with availability. | System Administration |

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| New User Record Created (via Add User Page) | This email can be configured as a notification and is triggered when a new user record is created via the Admin - Users page. This email is not sent to users who are created via a data feed. This email can be sent to the User Created, User Creator, or the User's Manager.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL. | System Administration |

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| Scheduled Report Complete | Scheduled Report is complete | System Administration |

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| Training Deactivation | This email is triggered when a training item is about to be deactivated. This email is only triggered when the course is set to deactivate on a specific date via the Deactivate this course setting in the Course Catalog > General settings. This email is not triggered when the course is deactivated by via the Active checkbox. The email can be sent to Training Contact and Training Owner. This email can be configured as a Reminder type email. This email is active by default and can be found in the System Administration action type section of Email Management.  Use Case: An administrator would like to be reminded that a training item is set to deactivate on December 31st. The Training Deactivation email is configured to trigger one week before the training item deactivates. When the administrator receives the email, the administrator reviews the training item to determine whether or not to reset the deactivation date, allow the course to become inactive, or remove the deactivation settings altogether. | System Administration |

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| Updated Training | Training has been updated to a new version, or pre-work, post-work, or a prerequisite is has been updated or added to the LO.  This is triggered by the user getting automatically updated to a new version of a LO. This email is only triggered by updates to LOs that are versioned, such as an online course, material, test, or curriculum. This email will not trigger for child LOs when they are versioned; in case of child LO versioning, the email will only trigger for the curriculum on the user's transcript.  The TITLE tag enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO.  The MATERIAL.START.DATE tag displays the material's start date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email.  The MATERIAL.END.DATE tag displays the material's end date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email. | System Administration |

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| User Password Change | This email is triggered any time a user changes their password. This email can be sent to User or User's Manager. | System Administration |

Test Engine Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Test Grading Notification | Notify the Test Grader of pending grade. | Test Engine |

Training Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Approve Training Request | This email is triggered when an approver approves a student's request for an online class, quick course, event, curriculum, library, posting, test, external training, material, or cohort. The available recipients for this email are Training request approvers, Assignor of the training, Cost center approver, Cost center owner, User's manager, or Student. | Training |

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| Assign Evaluation Task | The Assign Evaluation Task email is triggered for each individual student either 30, 60, or 90 days after the course was completed by that user. The date that this email is triggered is now the same date that the level 3 course evaluation task appears in the user's Scheduled Tasks area.  The Assign Evaluation Task email is only triggered for courses that have a level 3 course evaluation task activated. | Training |

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| Assign Survey Task | Process Assign Survey Task email. When an administrator creates a new survey task, they select which users will be assigned the survey task. When the task is created and saved, an email is sent to the selected users (Assessors assigned to a task). | Training |

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| Assign Training | The Assign Training email is designed to fire when a user is assigned an online class, quick course, event, curriculum, posting, test, video, or material. This email does not fire when a manager or administrator adds external training to a user’s transcript.  However, the Assign Training email trigger is also leveraged during the approval process and will also fire for any learning objects with an approval workflow required and will fire for external training after each approval if approvals are required. The email can be leveraged to notify the next approvers they have an approval waiting for the learning object. If there are multiple approvals required, this email will fire multiple times.    Note: If the user currently has a previous version of the training on his transcript and the previous version is version equivalence of its next version, the user will not get the 'Assign Training' email on the assignment of the next version. | Training |

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| Charge Credit Card | Confirmation of credit card charge. This email is triggered when the user goes through the registration and purchasing process, and the purchase has been finalized. | Training |

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| Defer Training Approval Request | Email will fire when Approval has been deferred to the next approver. The intended recipient is the next approver. If no additional approver is assigned, the email will not fire.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Deny Training Request | Once a user requests training, the system will check for required approvals from the user's approver. If an approval is required, the user's transcript will show a pending approval status. At this point the approver must either approve, defer, or deny the user request. If it is denied the user will receive this email. | Training |

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| Employee Pays | This email is triggered when a user requests training that requires payment. This will let the user know that they must pay to register for the training requested, before the training can be completed. | Training |

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| Evaluation Task Due | Process evaluation task due. This is triggered by the end date of a level 3 post-training course evaluation task. The end date is automatically calculated by adding the evaluation deadline specified on the Add Level 3 Evaluation page to the task start date. | Training |

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| External Training Completion Request | User requests completion of external training course. If a user has an approver, and they mark external training complete, the status will stay in Pending Completion status until the approver marks it complete. This email fires to the approver as soon as the user marks external training complete. | Training |

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| External Training is Complete | This email will fire once the user marks external training or free-form training completed. | Training |

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| LO Post work Reminder | This email will serve as a reminder for registered employees to complete Post-work required for various non-ILT learn objects. This trigger works with Tests, Online Courses, Quick Courses, and Materials. When users complete training items that require Post-work, this email can serve as notification for users regarding the required Post work item. | Training |

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| On the Job Training Observer Notification | This email alerts observers when users have requested observation for a specific OJT item. It is triggered when a user clicks the Notify Observer button next to an OJT item on their learning transcript. | Training |

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| Register | User registers for an online course, quick course, library, posting, video, curriculum or external content. This email will fire once the user becomes registered for the training. If the training is set up to be pre-approved and registered upon approval, this email will fire upon request. | Training |

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| Request External Training | User submits request for external training. This email is triggered when user adds external training to transcript.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Request Training | This email is triggered when a user selects the Request button for an event, online class, quick course, curriculum, library, posting, test, or material. This email can be sent to Student, User's manager, Cost center owner, Cost center approver, or Next approver if training request is pending.  This email is triggered even if approval is not required for the training. However, if "Next approver if training request is pending" is selected as the recipient, then the email is not triggered if approval is not needed.  This email is not triggered when an ILT session is requested. For ILT sessions, the Request ILT Session trigger should be used.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Request Webcast | User submits request for a webcast session. This email is triggered when a webcast session within an event is requested by a user.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| SF-182 Form Approval Step Response | This email is triggered when an approver approves or denies an SF-182 request. The email can be sent to the following recipients:   * Next approver if training request is pending (Note: Selecting this recipient sends the notification to all approvers defined in the approval step.) * Cost center approver * Cost center owner * User's manager * Student | Training |

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| SF-182 Form Approved | This email is triggered when the final approver approves the request or if there were no approvers available to approve the request. The email can be sent to the following recipients:   * Cost center approver * Cost center owner * User's manager * Student | Training |

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| SF-182 Form Denied | This email is triggered when an approver denies the request. The email can be sent to the following recipients:   * Cost center approver * Cost center owner * User's manager * Student | Training |

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| SF-182 Form Completion Documentation Submitted | When users add completion documentation to their SF-182 request, they have the option to send an automatic email to the approver, to notify the approver of the addition. The SF-182 Form Completion Documentation Submitted email is the email that is sent to the approver in this case.  For more information about adding completion documentation to a request: See SF-182 Forms - Add Completion Evidence. | Training |

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| SF-182 Form Submitted | This email is triggered when an administrator, manager, or user submits an SF-182 request. The approval notification is sent to the first approver if an approval workflow is configured for the request. The email can be sent to the following recipients:   * Next approver if training request is pending (Note: Selecting this recipient sends the notification to all approvers defined in the approval step.) * Cost center approver * Cost center owner * User's manager * Student | Training |

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| Survey Task Due | Process Survey Task Due email. This email works with the dates placed in the Date: section when creating a new survey task. The Reminder email type can be set up to remind the user within days, hours, or minutes before or after the survey task is due. | Training |

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| Training Approval Reminder | Confirms or reminds that one or more approvers must approve or deny a training request. This email trigger is different from the Request Training trigger because it is available for sessions and can be sent to the same user repeatedly when configured as a reminder until the user completes the action identified in the email. The trigger fires when the following is true:   * When configured as a Confirmation type email, this email is only triggered when the training status is Pending Approval. This email is not triggered if the training has already been approved. Email stops being sent to an approver who has approved or denied the request. * The training status is Pending Approval and a custom relationship is updated on the user record. Even if the custom relationship is not part of the existing approval workflow, the system recognizes that the custom relationship hierarchy has changed and will re-trigger the email to the approver that is designated in the approval template.   When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Training Completion Request Approved | Approver approves a training completion request. | Training |

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| Training Completion Request Denied | Approver denies a training completion request. | Training |

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| Training Completion Request | User requests completion of a training course.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Training Exemption Request | When a user submits an exemption request, a confirmation, notification, or reminder email can be sent to a user or the user's manager. The email trigger is active by default. | Training |

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| Training Exemption Response | When a manager submits a response to a direct report's exemption request, a confirmation, notification, or reminder email can be sent to a user or the user's manager. The email trigger is active by default. | Training |

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| Training is Available | This email is triggered when the available date is reached for a learning object in which the user has been assigned via a learning assignment. This email can be sent to Student or User's Manager. This email can be configured as a Notification type email. This email can be found in the Training action type section of Email Management.  Use Case: Use this trigger to send notifications to students when the training in which they are assigned is available to complete. | Training |

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| Training is Completed | This email will fire once the user has successfully completed a session, online class, quick course, curriculum, library, posting, test, or material.  To include a link to an associated Level 1 evaluation within the Training is Completed email, enter the tag, EVALUATION.LEVEL1, into the email body. When the email is sent to a user, the tag text is replaced by the link to the evaluation associated with the training item the user completed. The user can click this link to access and complete the Level 1 evaluation. Note: If no evaluation is associated with the training that was completed, the tag is removed from the email body and no content displays in its place.  Note: If no evaluation is associated with the completed training, the tag is removed from the email body and no content displays. Also, if the evaluation is completed prior to the email triggering, the tag is removed from the email body and no content is displayed. | Training |

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| Training is Due | Occurs when training is due. When a due date is applied to training, this email can be configured to fire before or after the training due date. The Reminder email can be set up to remind the user within days, hours, and minutes before or after the training is due. This email can be sent to Training request approvers, Assignor of the training, Cost center approver, Cost center owner, User's manager, or Student.  This email trigger will not fire for training that is in a Completed status. | Training |

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| Training Marked Exempt | When a manager or administrator marks an LO Exempt, a confirmation, notification, or reminder email can be sent to a user or the user's manager. The email trigger is active by default. | Training |

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| Training Plan Assigned | This email is triggered when a training plan is assigned and is triggered on the first day of the access period for a user who is a plan contributor or plan manager. The administrator can set a reminder before or after the training is assigned. If a planner's access period is changed, the user receives a new Training Plan Assigned email corresponding to the new start date of the access period. | Training |

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| Training Plan Due | This email is triggered on the last day of an access period for a plan contributor and also on the last day of a plan manager segment for a plan manager. The administrator can set a reminder before the due date arrives. | Training |

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| Training Plan Removed | This email is triggered when a plan contributor or manager is manually removed from a training assignment via the View Details page. This email is also triggered when a plan contributor segment or plan manager segment is removed from the plan. | Training |

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| Training Plan Submitted | This email is triggered when a plan contributor's training plan is submitted. | Training |

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| Training Removed from Transcript | If enabled, this email is triggered when an administrator removes a training item from a user's transcript. This email is also triggered when a training item is dynamically removed because the user was dynamically removed from a dynamic learning assignment. | Training |

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| Training version is Effective | This email is triggered when the Start Date is reached and the training becomes effective. Start Date is an Append Versioning option. This email can be sent to the Assignor of the training, the student's manager, the student, or a specific user. | Training |

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| Transcript Status Edited | When an administrator edits the user's transcript such as pricing, completion, due dates, etc., this email will be sent. | Training |

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| Transcript Updated | This email can be configured as a notification. When configured as a notification, this email is triggered when a transcript is updated via Data Merge. Either training records must be moved or an account should be deactivated for the email trigger to be activated. This email trigger is in the Training Action Type. This trigger can be sent to Destination User's Manager, Source User's Manager, Destination User, and Source User. | Training |

Training Form Management Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Submit Training Form | User submits a training form. | Training Form Management |

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| Training Form Approved | User's training form marked Approved by an Approver. | Training Form Management |

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| --- | --- | --- |
| Training Form Denied | User's training form marked Denied by an Approver. | Training Form Management |

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| --- | --- | --- |
| Training Form Task Assigned | Training form task assigned. | Training Form Management |

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| --- | --- | --- |
| Training Form Task Due | Training form task due. | Training Form Management |

Training Unit Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Training Unit Keycode: Monthly Balance Email | The email is triggered by the following:   * The Send monthly balance to training unit contact option is selected in Training Unit Preferences. The email provides recipients with the training unit balance and is sent on the last day of each month.   At least one training unit contact must be a recipient, and the email can also be sent to specific users. When sending the email to a specific user, at least one training unit contact must be included as a recipient. If there are no training unit contacts included as recipients, then the email does not fire.  Note: The email must be enabled in Training Unit Preferences for the training unit contact's division.  Note: The training unit contacts that are recipients of the email are dependent upon the OUs for which the email is enabled in Training Unit Preferences. For example, if the email is enabled for Division A but not for Division B, then the email is only sent to training unit contacts in Division A.   * A new training unit key code is purchased through the Shopping Cart feature. The email is sent to the training unit contact when the action occurs.   Note: If the training unit is purchased using a purchase order and the transaction is in a Pending Payment status, then the email is not triggered until the transaction is marked Completed in Manage Transactions. See Manage Transaction Overview for additional information. | Training Unit |

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| Redeemed Training Units (KeyCode) | This email is triggered each time a key code is used. This email can be sent to a specific user, the TU Contact, or the TU Redeemer. | Training Unit |

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| Training Unit Distribution Assigned (Distributor) | This email is triggered each time a distributor assigns training units to end users. This email can be sent to a specific user, the TU Recipient, the TU Creator, or the TU Distributors. | Training Unit |

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| Training Unit Distribution Created (Distributor) | This email is triggered each time a training unit key code distribution is created, which can be an addition to an existing key code or the creation of a new key code. This email can be sent to a specific user, the TU Creator, or the TU Distributors. | Training Unit |

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| --- | --- | --- |
| Training Unit Distribution Created (KeyCode) | This email is triggered each time a training unit key code distribution is created, which can be an addition to an existing key code or the creation of a new key code. This email can be sent to a specific user, the TU Creator, or the TU Contact. | Training Unit |

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| Training Unit Distribution Expires (Distributor) | This email is triggered each time a training unit key code distribution expires. This email can be sent to a specific user, the TU Creator, or the TU Distributors. | Training Unit |

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| --- | --- | --- |
| Training Unit Distribution Expires (KeyCode) | This email is triggered each time a training unit key code distribution expires. This email can be sent to a specific user, the TU Creator, or the TU Contact. | Training Unit |

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| Training Unit Expires | This email is triggered as a reminder that training units are scheduled to expire. This email can be sent to a specific user or the TU Recipient. | Training Unit |

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| Training Unit Revoked (Distributor) | This email is triggered each time a distributor revokes training units from end users. This email can be sent to a specific user, the user whose TU has been revoked, or the user who revoked the TU. | Training Unit |

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| Training Units Adjustment Email (KeyCode) | This email is triggered each time a key code balance is adjusted. This email can be sent to a specific user, the TU Creator, or the TU Contact. | Training Unit |

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| Training Units Low Balance Notification (KeyCode) | This email is triggered when a key code balance reaches or falls below the predetermined balance set on the Training Unit Preferences page for the training unit redeemer. This email can be sent to a specific user, the TU Creator, or the TU Contact. Note: The balance that triggers this email is the balance set in the training unit redeemer's OU settings. | Training Unit |

Universal Profile Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Badge Provided Notification | This email is triggered when an employee provides a badge for another employee on their Universal Profile - Feedback page. This email is not triggered for the Completed Goal post. This email can be sent as a notification to Feedback Recipient, Feedback Recipient's Manager, or a specific user. | Universal Profile |

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| Feedback Provided Notification | This email is triggered when an employee provides feedback for another employee on their Universal Profile - Feedback page. Feedback can be provided by posting directly to the Feedback page or by commenting on a Feedback post. This email is not triggered when the manager provides feedback to a direct report that is only visible to the user's manager. This email can be sent as a notification to Feedback Recipient or a specific user. | Universal Profile |

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| Feedback Request Notification | This email can be configured as a notification and is triggered when an employee requests feedback from their Feedback page. This email can be sent to a specific user, the Feedback Request Recipient, the Feedback Requester, or the Feedback Requester's Manager. | Universal Profile |

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

Email Triggers for Careers

This page contains email triggers that may apply to organizations using the Careers solution.

Default Password Administration Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Default Password Email Reminder Template | This email trigger can be used as a reminder when the default password is nearing expiration. This email is triggered a certain number of days before the default password expires. Administrators can configure when the email is triggered in relation to the default password expiration date. The emails are queued when the default password is set, so it is important to configure this email trigger prior to setting the default password. This email can be configured as a Reminder type email. This email can be sent to a specific administrator user. | Default Password Administration |

Other Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Copy Down Scheduled | A copy down completely copies your database from one environment to another. The Copy Down Scheduled email is triggered when a copy down is scheduled in the environment in which the email is enabled. This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled. For example, if a copy down is scheduled in Pilot from Production, the email is only triggered if the email is configured in Pilot. This email trigger ignores deadbox settings.  The following tags are available for this email trigger:   * DESTINATION.ENVIRONMENT * PORTAL.NAME * RECIPIENT.FIRST.NAME * RECIPIENT.LAST.NAME * REQUESTOR.EMAIL * SCHEDULE.DATETIME * SOURCE.ENVIRONMENT   It is highly recommended that the portal name, source environment, and destination environment email tags are included in the email body to ensure it is clear which portals and environments are being impacted by the copy down. | Other |

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| Login Message Email | This email is triggered when a recipient clicks an Action button that is configured in a login message to send an email to the recipient. The Login Message Email can only be added to login messages, which are configured in Login Message Preferences. | Other |

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| Recurring Billing Processor Event | This email is triggered when a user renews a subscription from the transcript page or when a manager assigns a curriculum extension to a user through inventory. This email can be sent to a specific user or the person in the Purchaser role. The user's manager can be copied on the email. | Other |

Performance Management Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Assessment Task Completion | This email is triggered when the entire assessment task is complete, regardless of the task due date. This email can be sent to the assessee or a specific user. | Performance Management |

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| Assessment Task Due Date | Occurs when assessment task is due. | Performance Management |

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| Assessor Assessment Task Assigned | This is triggered when a user is selected as an assessor for a competency assessment task. This email is triggered when an assessor is selected during the task configuration, when assessors are selected by a reviewee from within the competency assessment (when approval is not required), and when a selected assessor needing approval is approved. This email can be sent as a confirmation, notification, or a reminder to Assessor(s) or a specific user. | Performance Management |

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| Check-In Created | This email is triggered when a new Check-In series is created. This email can be sent to Check-Ins participants, Check-In creators, or a specific user. | Performance Management |

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| Development Plan Approval Denied | This email is triggered when a development plan approval request is denied. The user receives the email stating that their Development Plan Approval Request is denied. | Performance Management |

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| Development Plan Approval Granted | This email is triggered when a user's development plan is approved. This email is sent to the user who submitted the plan. | Performance Management |

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| Development Plan Approval Requested | This email is triggered when a development plan that requires approval has been submitted. The user in the approver role receives the email stating that a new development plan now exists in their list of development plans to approve. If the "Plans must be approved by" preference is not selected, this email is not triggered. | Performance Management |

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| Development Plan Assigned | This email is triggered when a development plan has been created by anyone other than the user. The user receives the email stating that a new development plan now exists in their list of development plans. | Performance Management |

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| Development Plan Cancellation Approval Requested | This email is triggered when a user attempts to cancel a development plan that has been approved and approval/cancellation approval is required. The approval setting is configurable by OU on the Development Plan Preferences page.  This email is sent to the user in the approver role. If no approver exists, the development plan is automatically cancelled and no email is sent. If the "Plans must be approved by" preference is not selected, this email does not fire. | Performance Management |

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| Development Plan Comment Added | This email is triggered when a comment is added to a user's development plan. This includes a comment added to the plan, a comment added to an objective, or when any comment receives a reply. This email is not triggered when the designated email recipient is the user who added the comment. For example, if the triggers is configured to send to the approver and the approver adds a comment to the plan, then this email is not triggered since the intended recipient is the one who added the comment. This email is available within the Performance Management action type, and it can be sent as a Notification to Dev Plan Approver or Dev Plan User.  The following tags are available for this email trigger:   * DEVPLAN.APPROVER.FIRST.NAME - This displays the development plan approver's first name. * DEVPLAN.APPROVER.LAST.NAME - This displays the development plan approver's last name. * DEVPLAN.TITLE - This displays the development plan title. * DEVPLAN.LINK - This displays a link to access the development plan. * DEVPLAN.USER.FIRST.NAME - This displays the development plan user's first name. * DEVPLAN.USER.LAST.NAME - This displays the development plan user's last name. * USER.FIRST.NAME - This displays the recipient's first name. * USER.LAST.NAME - This displays the recipient's last name. | Performance Management |

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| Development Plan Due Date Approaching | This email is triggered when a development plan is due. The user receives the email stating that they have a Development Plan due date approaching. Reminder emails can be set similar to other reminder emails. | Performance Management |

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| Development Plan Item Due Date Approaching | This email is triggered when a development plan item (either an action step or training item) is coming due. The user receives the email stating that they have a Development Plan item due date approaching. Reminder emails can be set similar to other reminder emails. | Performance Management |

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| External Reviewer Added | This email is triggered when an external user is added to a performance review.  The available recipients are Reviewee, Reviewer Selector (the reviewer who added the external reviewer), and External Reviewer (the external reviewer that was added to trigger the email). | Performance Management |

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| External User Assessment Task Assigned | This email is triggered when an external user is assigned as an assessor for a competency assessment task, and this may occur when an assessor is selected during the task configuration, when assessors are selected by a reviewee from within the competency assessment (when approval is not required), and when a selected assessor needing approval is approved. This email can be sent to Assessor(s) or a specific user.  Note: If this trigger is configured as a reminder, it acts as a reminder that the task is assigned. It DOES NOT act as a task due date reminder. | Performance Management |

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| Goal Approved | This email is triggered when a user submits a goal or requests to cancel a goal and the request is approved by the approver. | Performance Management |

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| Goal Assigned to You | This email is triggered when a goal is created and assigned to a user by anyone other than that user (i.e., this email is not triggered if you create a goal for yourself). The goal owner or goal owner's manager will receive an email stating that a new goal now exists in their list of goals.  The email can contain a link to the Goals page. | Performance Management |

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| Goal Cancelled | This email is triggered when a goal is cancelled by someone other than the goal owner. The email can be sent to either the goal owner or the goal owner's manager. If the goal owner cancels their own goal, the email is not triggered.   * The Goal Cancelled email does not fire to the user who initiated the goal cancellation or a user that approved the cancellation. For example, if the goal owner's manager is set as a recipient of this email, they do not receive the email if they cancel the goal of their subordinate. | Performance Management |

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| Goal Denied | This email is triggered when a user submits a goal or requests to cancel a goal and the request is denied by the approver. | Performance Management |

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| Goal Modification | This email is sent to the goal owner when their goal is modified by another user (e.g., manager, indirect manager). If the goal owner modifies their own goal, the email is not triggered. If only the goal comments or goal attachments are modified, the email is not triggered. | Performance Management |

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| Peer Approval Request | This email is triggered when a subordinate creates a peer. This email can be configured as a Notification or Reminder type email to alert the recipient that a approval has been requested for a peer. This email can be sent to User or User's Manager. | Performance Management |

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| Performance Review Co-Planner Added | This email is triggered when a co-planner is added to a performance review from within the performance review task by the reviewer OR added by an administrator via the View Details page (if the task is configured to allow reviewers to add co-planners).  The available recipients are Reviewee, Reviewer (the reviewer who added the co-planner), and Co-Planners. Selecting Co-Planners triggers a separate email to all users who are named as co-planners for the task.  For co-planners without access to email, tasks display "Co-planner" at the end of task name for easy identification. | Performance Management |

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| Performance Review Reviewer Commented | This email is triggered when a reviewer adds a comment as part of a discussion thread within an off-cycle performance review. Discussions cannot be part of a standard performance review task.  The available recipients are Reviewee, Reviewer (the commenting reviewer), and Comment Recipients. Selecting Comment Recipients triggers a separate email to all users who have visibility to the comment. For example, a private comment only triggers emails to the reviewee or the person to which the reviewee is replying. A public comment triggers emails to the reviewee and all reviewers. | Performance Management |

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| Performance Review Reviewer Declined | This email is triggered when a reviewer declines a review.  The available recipients are Reviewee, Reviewer (the declining reviewer), and Review Selector (the user that selects the reviewers. | Performance Management |

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| Performance Review Step Assigned | Performance review of a specific user assigned. This email is triggered when the task step is available for that user to review, which may be triggered by the employee hire date, the previous reviewer submitting the review, or the task assignment date. Note: When customizing this email for a self-review step, this email cannot be sent to "Reviewer" because the system considers this user the reviewee.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step.  This email trigger can be sent to external users. If the REVIEW.LINK tag is used in the trigger and is sent to an external reviewer, then the link takes external reviewers to an external review page that requires no login or validation. See External Reviewers for additional information. | Performance Management |

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| Performance Review Step Completed | The Performance Review Step Completed email is only sent to the reviewee regarding other reviewers in the same sequence (if there is any). It is not designed to send email to own reviewer or the person (self) who is completing the review.  This email is not sent to other Reviewers. | Performance Management |

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| Performance Review Step Due Date | This email is triggered when a performance review task is due. If this email is sent to the recipient group "Reviewer" then only the users that have received performance reviews will receive the email. This email is conditional so that it only includes the users who are in progress or have not started. Note: When customizing this email for a self-review step, this email cannot be sent to "Reviewer" because the system considers this user the reviewee.  This email can be set up as a reminder to go out before the due date. The reminder will not be sent to reviewers that have already completed the review.  The due date for performance review tasks is defined for each reviewer group on step 2 of creating a performance review task. This date is not necessarily the same as the task end date for it may occur before the task ends. Reviewers will not be locked out of the task on the task due date unless it is the same date as the task end date.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step.  Note: Email Digest emails do not include past-due notifications for optional or locked performance review steps after the step due date. | Performance Management |

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| Performance Review Step Reopened | This email is triggered when a performance review step is reopened in order to alert or remind the user that a performance step has been reopened. When configured, this email is triggered any time a step is reopened, whether it is done by a manager or administrator. This email can be sent to Reviewee, Reviewee's Direct Manager, Reviewee's Indirect Manager, Reviewer, or a specific user.  The REOPEN.STEP.COMMENT tag displays the Reason commentary that was provided when the review step was reopened.  The REVIEW.REOPENED.STEP.DUE.DATE email tag displays the due date of the performance review step that is reopened. If no due date is defined for the step, then "No Due Date Defined" is displayed.  The system verifies that the review step is still due prior to triggering the email, so if the review step is no longer due, then this email is not triggered.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step. | Performance Management |

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| Performance Review Task Assigned | This email is triggered when the task is assigned to a user. This email is not triggered for a self-review task. However, if the reviewer is specifically named as the recipient of the email trigger, the email is still triggered to that reviewer. For example:   * If the email trigger is configured to be sent to "Reviewee" and John Doe launches a review in which he is the reviewee, he does not receive the email because he launched the review task. * If the email trigger is configured to be sent to "John Doe" and "Reviewee" and John Doe launches a review in which he is the reviewee, he does receives the email because he is named as a specific recipient. | Performance Management |

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| Performance Review Task Completed | This email is triggered when a performance review task is completed (i.e., the overall performance review has been completed). This email can be set up as a reminder to go out at a certain time in relation to the completion of the task. The email can also be set up as a confirmation, notification, or promotional email.  This email can be sent to the reviewee, reviewee's manager, the reviewee's indirect manager, or a specific user.  Use Case: An administrator creates an Annual Performance Review task and would like all reviewees to be informed when the performance review has been completed. She configures the Performance Review Task Email to trigger on the date that the last step of the performance review task is due and sets the recipient as "Reviewee." | Performance Management |

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| Request Goal Approval | This email is a batch type email that includes a notification for each situation in which a goal owner does the following:   * Creates and submits a goal for themselves when approval is required. * Edits and resubmits a goal that has already been approved. * Attempts to cancel a goal that has been approved when approval is required.   This email is triggered when a user clicks the Send Approval Request button on the My Goals or Snapshot Goals page.  The email is sent to the user in the Approver role. If no approver is set or if goal approval is not required, the goal is automatically approved and no email is sent.  The email can contain a link to the Pending Goals page. | Performance Management |

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| --- | --- | --- |
| Request Goal Approval | This email is a batch type email that includes a notification for each situation in which a goal owner does the following:   * Creates and submits a goal for themselves when approval is required. * Edits and resubmits a goal that has already been approved. * Attempts to cancel a goal that has been approved when approval is required.   This email is triggered when a user clicks the Send Approval Request button on the My Goals or Snapshot Goals page.  The email is sent to the user in the Approver role. If no approver is set or if goal approval is not required, the goal is automatically approved and no email is sent.  The email can contain a link to the Pending Goals page. | Performance Management |

System Administration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Admin Password Change | This email is triggered when an administrator manually resets a user's password. The user's new password cannot be included in the email. Because of this, the administrator must communicate this password outside of the system. This email can be sent to User or User's Manager. | System Administration |

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| Effective Dating Error | This email is triggered when a user record change that was set with a future effective date attempts to process and an error is generated. The email can be sent as a notification to User, User's Manager, User's Approver, or a specific user.  The EFFECTIVE.DATING.ERROR.DESCRIPTION tag can be included in the email message to include the description of the effective dating error. If there are multiple errors, then each error description is displayed on its own line in the message. | System Administration |

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| Forget Password | If the Password Reset Option in Password Preferences is set to Reset By Email Notification, then the Forget Password email is triggered when a user clicks Forgot Password? on the Login page. This email can be sent to External User or Internal User. If the user clicks Forgot Password? multiple times and a password reset URL is included in the email, then a new URL is generated for each email and the previous URL is no longer valid.  This email must be configured for administrators to select the "Send Password Reset Email to user's email address" option when resetting a user's password on the Admin - Users page.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Defining Availability  The availability settings do not apply to external users when External User is added as a recipient in the Send To field.  When Internal User is added to the Send To field, the availability settings defined in the Availability field apply to internal users based on the organizational unit (OU) to which they belong. The following rules apply by OU:   | Organizational Unit | Rule | | --- | --- | | Cost Center | Cost Center if user is part of the Cost Center | | Custom Group | Custom group if user is part of the Custom Group | | Division | Division user belongs to | | Grade | Grade user belongs to | | Location | Location user belongs to | | Position | Position user belongs to | | Self-Registration Group | Self-Registration group if user is part of the group | | User | User if user is added individually | | System Administration |

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| --- | --- | --- |
| LAT Draft Review | This email is triggered when a learning assignment draft is created, and the following are true:   * The High User Count threshold is exceeded * The Restrict Submission setting is enabled * The administrator who created the draft does not have permission to submit the draft   This email is triggered an additional time if an administrator edits and saves the same draft if all of the criteria are still true.  Example 1: Administrator A creates a draft assignment with a user count that is above the High User Count threshold, but the Restrict Submission setting is disabled. The email is not triggered.  Example 2: Administrator A attempts to create a learning assignment that exceeds the High User Count threshold, and the Restrict Submission setting is enabled. Administrator A does not have permission to submit draft assignments. Administrator A receives the High User Count restriction and the can only save the assignment as a draft, and this triggers the LAT Draft Review email.  This email can be configured to be sent to Draft Reviewers or specific users. When this email is sent to Draft Reviewers, this includes all administrators who have the Assignment Tool - Submit Draft permission regardless of permission constraints. Administrators may further restrict the recipient list by adding specific users or by restricting with availability. | System Administration |

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| New User Record Created (via Add User Page) | This email can be configured as a notification and is triggered when a new user record is created via the Admin - Users page. This email is not sent to users who are created via a data feed. This email can be sent to the User Created, User Creator, or the User's Manager.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL. | System Administration |

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| --- | --- | --- |
| Scheduled Report Complete | Scheduled Report is complete | System Administration |

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| --- | --- | --- |
| Training Deactivation | This email is triggered when a training item is about to be deactivated. This email is only triggered when the course is set to deactivate on a specific date via the Deactivate this course setting in the Course Catalog > General settings. This email is not triggered when the course is deactivated by via the Active checkbox. The email can be sent to Training Contact and Training Owner. This email can be configured as a Reminder type email. This email is active by default and can be found in the System Administration action type section of Email Management.  Use Case: An administrator would like to be reminded that a training item is set to deactivate on December 31st. The Training Deactivation email is configured to trigger one week before the training item deactivates. When the administrator receives the email, the administrator reviews the training item to determine whether or not to reset the deactivation date, allow the course to become inactive, or remove the deactivation settings altogether. | System Administration |

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| --- | --- | --- |
| Updated Training | Training has been updated to a new version, or pre-work, post-work, or a prerequisite is has been updated or added to the LO.  This is triggered by the user getting automatically updated to a new version of a LO. This email is only triggered by updates to LOs that are versioned, such as an online course, material, test, or curriculum. This email will not trigger for child LOs when they are versioned; in case of child LO versioning, the email will only trigger for the curriculum on the user's transcript.  The TITLE tag enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO.  The MATERIAL.START.DATE tag displays the material's start date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email.  The MATERIAL.END.DATE tag displays the material's end date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email. | System Administration |

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| --- | --- | --- |
| User Password Change | This email is triggered any time a user changes their password. This email can be sent to User or User's Manager. | System Administration |

Universal Profile Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Badge Provided Notification | This email is triggered when an employee provides a badge for another employee on their Universal Profile - Feedback page. This email is not triggered for the Completed Goal post. This email can be sent as a notification to Feedback Recipient, Feedback Recipient's Manager, or a specific user. | Universal Profile |

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| --- | --- | --- |
| Feedback Provided Notification | This email is triggered when an employee provides feedback for another employee on their Universal Profile - Feedback page. Feedback can be provided by posting directly to the Feedback page or by commenting on a Feedback post. This email is not triggered when the manager provides feedback to a direct report that is only visible to the user's manager. This email can be sent as a notification to Feedback Recipient or a specific user. | Universal Profile |

|  |  |  |
| --- | --- | --- |
| Feedback Request Notification | This email can be configured as a notification and is triggered when an employee requests feedback from their Feedback page. This email can be sent to a specific user, the Feedback Request Recipient, the Feedback Requester, or the Feedback Requester's Manager. | Universal Profile |

Additional Email Triggers

A full list of all email triggers is also available. See Email Triggers on page 154 for additional information.

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

Email Triggers for Cornerstone HR

This page contains email triggers that may apply to organizations using the Cornerstone HR solution.

Default Password Administration Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Default Password Email Reminder Template | This email trigger can be used as a reminder when the default password is nearing expiration. This email is triggered a certain number of days before the default password expires. Administrators can configure when the email is triggered in relation to the default password expiration date. The emails are queued when the default password is set, so it is important to configure this email trigger prior to setting the default password. This email can be configured as a Reminder type email. This email can be sent to a specific administrator user. | Default Password Administration |

Form Management Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Form Approval Completed | This email is triggered when a form request is completed by the approver. The form request is considered Completed if the request is approved, denied, or denied and returned. The email can be sent to Form Responder, Request Recipient, or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default.  This email is triggered by the status of the form request, not the status of the form. For example, if the form approval request is denied and returned, the form status is Returned but the email is triggered because the form approval request is considered Completed.  Note: The form responder is the user who submitted the form.  Use Case: This trigger notifies the form responder (user who submitted the form) and approvers that the form approval request is completed. | Form Management |

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| --- | --- | --- |
| Form Approval Required | This email is triggered when a form request is assigned to an approver. The email can be sent to Request Recipient or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Form Management action type section of Email Administration.  Use Case: This trigger notifies approvers that they have a pending form approval request to complete. | Form Management |

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| --- | --- | --- |
| Form Assigned | This email is triggered when a form is assigned to a user. The email can be sent to Form Assignee or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications and reminders to users when forms are assigned. | Form Management |

|  |  |  |
| --- | --- | --- |
| Form Completed | This email is triggered when a form that is associated with a form task is completed. This email is not triggered if the form is not associated with a form task. The email can be sent to Form Assignee, Form Assignee Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications to users when form tasks are completed. | Form Management |

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| --- | --- | --- |
| Self-Service Form Submitted | This email is triggered when a self-service form is submitted for the given form. The email can be sent to Approver, Form Respondent, Manager, or a specific user. When a form is submitted via proxy, this email is not sent to the proxy user. This email can be configured as a Notification type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications when self-service forms are submitted. | Form Management |

Other Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Copy Down Scheduled | A copy down completely copies your database from one environment to another. The Copy Down Scheduled email is triggered when a copy down is scheduled in the environment in which the email is enabled. This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled. For example, if a copy down is scheduled in Pilot from Production, the email is only triggered if the email is configured in Pilot. This email trigger ignores deadbox settings.  The following tags are available for this email trigger:   * DESTINATION.ENVIRONMENT * PORTAL.NAME * RECIPIENT.FIRST.NAME * RECIPIENT.LAST.NAME * REQUESTOR.EMAIL * SCHEDULE.DATETIME * SOURCE.ENVIRONMENT   It is highly recommended that the portal name, source environment, and destination environment email tags are included in the email body to ensure it is clear which portals and environments are being impacted by the copy down. | Other |

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| --- | --- | --- |
| Login Message Email | This email is triggered when a recipient clicks an Action button that is configured in a login message to send an email to the recipient. The Login Message Email can only be added to login messages, which are configured in Login Message Preferences. | Other |

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| --- | --- | --- |
| Recurring Billing Processor Event | This email is triggered when a user renews a subscription from the transcript page or when a manager assigns a curriculum extension to a user through inventory. This email can be sent to a specific user or the person in the Purchaser role. The user's manager can be copied on the email. | Other |

Planning Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| WFP Not Implemented System Event Email | This email is triggered if an event occurring in Planning does not have an associated email action available. This email is a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Plan CoPlanners Changed | This email is triggered when the Co-Planners for a given plan are changed, whether that is adding or removing Co-Planners. The email i sent to User assigned as Primary Planner and Users assigned as CoPlanners (new).  The tags in this email reference the given plan, which is the recipient's plan. This email is a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Plan Created | This email is triggered to notify the user that the plan was created successfully. The email can be sent to User who created plan (owner). This email is configured as a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Plan Due Date Changed | This email is triggered when the Due date for a given plan is changed. The tags in this email reference the given plan, which is the recipient's plan.  The email is sent to User assigned as Primary Planner and Users assigned as CoPlanners. This email can be configured as a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Plan Primary Planner Changed | This email is triggered when the Primary Planner for a given plan is changed. The tags in this email reference the given plan, which is the recipient's plan.  The email is sent to User assigned as Primary Planner (new) and Users assigned as CoPlanners. This email can be configured as a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Subplan Accepted | This email is triggered when the Subplan is accepted by the parent planner. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Subplan Assigned To CoPlanner | This email is triggered when the Subplan is accepted by the parent planner. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email. | Planning |

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| WFP Subplan Assigned To Primary Planner | This email is triggered a specific user when s/he is assigned as Primary Planner.  The email is sent to User assigned as Primary Planner in this event. This email can be configured as a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Subplan Rejected | This email is triggered when a subplan is rejected by Parent Planner. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Subplan Submitted To Primary Planner | This emails is triggered as notification that a subplan was submitted and needs review. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as parent plan's primary planner. This email can be configured as a Notification type email. | Planning |

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| --- | --- | --- |
| WFP Subplan Submitted | This emails is triggered as confirmation that a subplan was submitted for review. The tags in the email refer to the subplan, not the parent plan.  The email is sent to User assigned as subplan's primary planner and the subplan's CoPlanners. This email can be configured as a Notification type email. | Planning |

System Administration Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Admin Password Change | This email is triggered when an administrator manually resets a user's password. The user's new password cannot be included in the email. Because of this, the administrator must communicate this password outside of the system. This email can be sent to User or User's Manager. | System Administration |

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| Effective Dating Error | This email is triggered when a user record change that was set with a future effective date attempts to process and an error is generated. The email can be sent as a notification to User, User's Manager, User's Approver, or a specific user.  The EFFECTIVE.DATING.ERROR.DESCRIPTION tag can be included in the email message to include the description of the effective dating error. If there are multiple errors, then each error description is displayed on its own line in the message. | System Administration |

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| Forget Password | If the Password Reset Option in Password Preferences is set to Reset By Email Notification, then the Forget Password email is triggered when a user clicks Forgot Password? on the Login page. This email can be sent to External User or Internal User. If the user clicks Forgot Password? multiple times and a password reset URL is included in the email, then a new URL is generated for each email and the previous URL is no longer valid.  This email must be configured for administrators to select the "Send Password Reset Email to user's email address" option when resetting a user's password on the Admin - Users page.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Defining Availability  The availability settings do not apply to external users when External User is added as a recipient in the Send To field.  When Internal User is added to the Send To field, the availability settings defined in the Availability field apply to internal users based on the organizational unit (OU) to which they belong. The following rules apply by OU:   | Organizational Unit | Rule | | --- | --- | | Cost Center | Cost Center if user is part of the Cost Center | | Custom Group | Custom group if user is part of the Custom Group | | Division | Division user belongs to | | Grade | Grade user belongs to | | Location | Location user belongs to | | Position | Position user belongs to | | Self-Registration Group | Self-Registration group if user is part of the group | | User | User if user is added individually | | System Administration |

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| --- | --- | --- |
| LAT Draft Review | This email is triggered when a learning assignment draft is created, and the following are true:   * The High User Count threshold is exceeded * The Restrict Submission setting is enabled * The administrator who created the draft does not have permission to submit the draft   This email is triggered an additional time if an administrator edits and saves the same draft if all of the criteria are still true.  Example 1: Administrator A creates a draft assignment with a user count that is above the High User Count threshold, but the Restrict Submission setting is disabled. The email is not triggered.  Example 2: Administrator A attempts to create a learning assignment that exceeds the High User Count threshold, and the Restrict Submission setting is enabled. Administrator A does not have permission to submit draft assignments. Administrator A receives the High User Count restriction and the can only save the assignment as a draft, and this triggers the LAT Draft Review email.  This email can be configured to be sent to Draft Reviewers or specific users. When this email is sent to Draft Reviewers, this includes all administrators who have the Assignment Tool - Submit Draft permission regardless of permission constraints. Administrators may further restrict the recipient list by adding specific users or by restricting with availability. | System Administration |

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| --- | --- | --- |
| New User Record Created (via Add User Page) | This email can be configured as a notification and is triggered when a new user record is created via the Admin - Users page. This email is not sent to users who are created via a data feed. This email can be sent to the User Created, User Creator, or the User's Manager.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL. | System Administration |

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| --- | --- | --- |
| Scheduled Report Complete | Scheduled Report is complete | System Administration |

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| --- | --- | --- |
| Training Deactivation | This email is triggered when a training item is about to be deactivated. This email is only triggered when the course is set to deactivate on a specific date via the Deactivate this course setting in the Course Catalog > General settings. This email is not triggered when the course is deactivated by via the Active checkbox. The email can be sent to Training Contact and Training Owner. This email can be configured as a Reminder type email. This email is active by default and can be found in the System Administration action type section of Email Management.  Use Case: An administrator would like to be reminded that a training item is set to deactivate on December 31st. The Training Deactivation email is configured to trigger one week before the training item deactivates. When the administrator receives the email, the administrator reviews the training item to determine whether or not to reset the deactivation date, allow the course to become inactive, or remove the deactivation settings altogether. | System Administration |

|  |  |  |
| --- | --- | --- |
| Updated Training | Training has been updated to a new version, or pre-work, post-work, or a prerequisite is has been updated or added to the LO.  This is triggered by the user getting automatically updated to a new version of a LO. This email is only triggered by updates to LOs that are versioned, such as an online course, material, test, or curriculum. This email will not trigger for child LOs when they are versioned; in case of child LO versioning, the email will only trigger for the curriculum on the user's transcript.  The TITLE tag enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO.  The MATERIAL.START.DATE tag displays the material's start date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email.  The MATERIAL.END.DATE tag displays the material's end date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email. | System Administration |

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| --- | --- | --- |
| User Password Change | This email is triggered any time a user changes their password. This email can be sent to User or User's Manager. | System Administration |

Universal Profile Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Badge Provided Notification | This email is triggered when an employee provides a badge for another employee on their Universal Profile - Feedback page. This email is not triggered for the Completed Goal post. This email can be sent as a notification to Feedback Recipient, Feedback Recipient's Manager, or a specific user. | Universal Profile |

|  |  |  |
| --- | --- | --- |
| Feedback Provided Notification | This email is triggered when an employee provides feedback for another employee on their Universal Profile - Feedback page. Feedback can be provided by posting directly to the Feedback page or by commenting on a Feedback post. This email is not triggered when the manager provides feedback to a direct report that is only visible to the user's manager. This email can be sent as a notification to Feedback Recipient or a specific user. | Universal Profile |

|  |  |  |
| --- | --- | --- |
| Feedback Request Notification | This email can be configured as a notification and is triggered when an employee requests feedback from their Feedback page. This email can be sent to a specific user, the Feedback Request Recipient, the Feedback Requester, or the Feedback Requester's Manager. | Universal Profile |

Additional Email Triggers

A full list of all email triggers is also available. See Email Triggers on page 154 for additional information.

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

Email Triggers for Learning

This page contains email triggers that may apply to organizations using the Learning solution.

Billing Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Order Status Adjusted | This email is triggered when a user's order status is changed. This email can be sent to a specific user, position, Purchaser, or Order Status Adjuster. | Billing |

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| Pending Payment Notification | This email is triggered when a user checks out using the Send Bill functionality and is subject to the Pending Payment status. This alerts them that they are in Pending Payment status. This email can be sent to a specific user, position, or the Purchaser. Note: This email trigger does not fire for Training Unit purchases. | Billing |

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| --- | --- | --- |
| Shopping Cart Purchase | This email is triggered when a shopping cart purchase is made. This email can be sent to the shopping cart owner or the purchase actor. | Billing |

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| --- | --- | --- |
| Transaction Price Adjusted | This email is triggered when a transaction price is adjusted by an administrator. This email can be sent to a specific user, the Purchaser, or Price Adjustor. | Billing |

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| --- | --- | --- |
| Transaction Price Refunded | This email is triggered when a transaction price is refunded and a course is removed from a transcript by an administrator. This email can be sent to a specific user, the Purchaser, or Refunding Administrator. | Billing |

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| --- | --- | --- |
| Unpurchased Items in Shopping Cart | This email is triggered when a user adds at least one item to their shopping cart. When the email is triggered, any existing items in the shopping cart that can no longer be purchased are removed. The email can be sent to Shopping Cart Owner or a specific user. This email can be configured as a Reminder type email. This email is active by default and can be found in the Billing action type section of Email Administration.  Users may receive this email multiple times, depending on the configuration in Email Administration. For example, the administrator configures two emails, one that triggers three days after the user adds an item to their cart without purchasing the item, and another email that triggers seven days after the unpurchased item is added to the cart.  This email trigger is reset each time the shopping cart is emptied or when a purchase is complete.  Use Case: Use this email to remind users that there are unpurchased items in their shopping cart.  Note: The email is not triggered if all of the unpurchased training in the shopping cart is expired. | Billing |

Certification Emails

All certification emails can be sent to the certification candidate, certification candidate manager, or certification owner.

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Approve Certification | This email is triggered when a user's request to enroll in a certification is approved. | Certification |

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| --- | --- | --- |
| Assigned Certification | This email is triggered when a user is assigned a certification; the certification still requires registration and approval. | Certification |

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| --- | --- | --- |
| Certification Credits Adjusted | This email is triggered when an administrator manually adjusts a user's credits that are applied to a certification from the Certification Report page. | Certification |

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| --- | --- | --- |
| Certification Credits Received | This email is triggered when a user receives credit for completing a training item that is applied to a certification. If the learning object applies to multiple certifications, only one email is fired. | Certification |

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| --- | --- | --- |
| Certification Due Date Adjusted | This email is triggered when a certification due date is changed. This email can be sent to the Certification Candidate, Certification Candidate Manager, or Certification Owner. If the new certification due date is after the time the Certification Period Due email is scheduled to be sent, the Certification Due Date Adjusted email is not triggered. | Certification |

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| --- | --- | --- |
| Certification External Training Credit Applied | This email is triggered when credit from external training is approved and applied to the certification. | Certification |

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| --- | --- | --- |
| Certification External Training Credit Denied | This email is triggered when a request to apply external training to a certification is denied. This email is active by default. This email can be configured as a confirmation, notification, or reminder type email. The email can be sent to Certification Candidate, Certification Candidate Manager, Certification Owner, or a specific user.  Use Case: Upon reviewing a user's request to apply external training from a local university to the Customer Service Certification, the certification approver denies the request. The user is notified by email that the request is denied. | Certification |

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| --- | --- | --- |
| Certification External Training Credit Submission Confirmation | This email is triggered when a user submits external training for certification credit. | Certification |

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| Certification On Hold | Administrators can configure an email notification to automatically send to users when their certification is placed in an On Hold status using the Certification On Hold email trigger. The existing tags for Certification emails are available with the Certification On Hold email trigger. | Certification |

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| --- | --- | --- |
| Certification Period Begin Reminder | This reminder email is triggered when a certification period begins. | Certification |

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| --- | --- | --- |
| Certification Period Completion Notification | This email is triggered when a user has successfully completed all requirements for a certification period. | Certification |

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| Certification Period Expiration | This email is triggered as a reminder that the certification period expiration is approaching. | Certification |

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| Certification Period Overdue Notification | This email is triggered when a user has not completed the certification requirements by the due date or the certification expiration date. If all requirements are complete, this email is not triggered. | Certification |

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| Certification Reversioned | This email is triggered when a user has been moved to a new version of a certification. | Certification |

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| Certification Revoked | This email can be configured to be triggered when a user's certification status is set to Revoked. This email can be configured as a confirmation, notification, or reminder. When configured as a confirmation or notification, the email is triggered immediately after a certification is revoked. When configured as a reminder, the email is triggered on the defined date relative to the certification being revoked as long as the status of the user's certification is still Revoked. The available recipients in the Send To and CC fields are Certification Candidate, Certification Candidate's Manager, and Certification Owner. | Certification |

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| Deny Certification | This email is triggered when a user's request to enroll in a certification is denied. | Certification |

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| Enrolled in Certification | This email is triggered when a user becomes enrolled in a certification via assignment or proxy enrollment. This email is triggered for the initial enrollment, but is not triggered for renewal periods. | Certification |

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| Remove Certification | This email is triggered when an administrator removes a certification for a user from the Certification Management page using the delete icon (trash can). Bulk Removals done through the certification removal tool or removal triggered through the dynamic removal setting on a dynamic certification proxy enrollment will not trigger the Remove Certification email. | Certification |

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| Request Certification | This email is triggered when a user submits a request to enroll in a certification. | Certification |

Collaborative Learning Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Assign Cohort | This email is triggered when a cohort learning object (LO) is assigned to a user. This email can be sent as a notification to Next approver if training request is pending, Assignor of the training, Cost center approver, Cost center owner, Cohort Instructor, Cohort Training Contact, User's manager, Student, User's Approver, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

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| Cohort Changed | This email is triggered when the cohort Start Date, End Date, Instructor, or Structure is modified and the cohort has at least one enrolled user. This email can be sent as a notification to the Cohort Instructor, Student, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

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| Cohort End Date | This email is triggered at a certain time before or after the end date of a cohort learning object (LO). All instances of this email are added to the email queue when the cohort is created. Any email triggers that are configured to be sent before the cohort end date are only sent if the email trigger is configured before the cohort is created. If the cohort end date is modified, then all queued emails are updated to reflect the new start date. This email can be sent as a notification, confirmation, or reminder to Cohort Instructor, Cohort Training Contact, Student, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

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| --- | --- | --- |
| Cohort Start Date | This email is triggered at a certain time before or after the start date of a cohort learning object (LO). All instances of this email are added to the email queue when the cohort is created. Any email triggers that are configured to be sent before the cohort start date are only sent if the email trigger is configured before the cohort is created. If the cohort start date is modified, then all queued emails are updated to reflect the new start date. This email can be sent as a notification, confirmation, or reminder to Cohort Instructor, Cohort Training Contact, Student, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

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| Register Cohort | This email is triggered when a user registers for a cohort learning object (LO). This email can be sent as a notification to Assignor of the training, Cost center approver, Cost center owner, Cohort Instructor, Cohort Training Contact, User's manager, Student, User's Approver, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

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| --- | --- | --- |
| Request Cohort | This email is triggered when a user requests a cohort learning object (LO). This email can be sent as a notification to Next approver if training request is pending, Cost center approver, Cost center owner, Cohort Instructor, Cohort Training Contact, User's manager, Student, Training Owner, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

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| Video Comment - New | This email is triggered when a new comment is added to a collaborative learning video. This email can be sent as a notification to Cohort Instructor, Video Comment Author, Video Comment Author's Manager, or a specific user. If the notification is sent to Cohort Instructor, this includes all of the cohort's instructors if there is more than one. | Collaborative Learning |

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| Video Comment - Reply | This email is triggered when an instructor replies to a comment that was added to a collaborative learning video. This email can be sent as a notification to the Video Comment Author, Video Comment Author's Manager, or a specific user. | Collaborative Learning |

Connect (Old Connect) Emails

Note: Email links in Connect-related emails link to postings for portals that use Single Sign On (SSO). When users click the link in the email, the user is taken directly to the linked posting.

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Comment Added - Subscribed Posting | Notify a posting subscriber that a comment has been added to the posting. Posting types where a comment or response is added include types, File, URL, Q&A, Suggestions, Forum, Blog entry, Webcast episode and Podcast episode. | Connect |

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| --- | --- | --- |
| Comment/Response Added to Posting | Notify a posting author that a comment has been added to the posting. Posting types where a comment or response is added include types, File, URL, Q&A, Suggestions, Forum, Blog entry, Webcast episode and Podcast episode. If a comment was made to the second author's posting in a blog, the email notification will go Author #2, not the author who created the first blog posting (Author 1). | Connect |

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| Connect Posting Approval Request | User has added a posting which requires approval | Connect |

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| Connection Request | A user has requested a connection | Connect |

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| New Connect Profile Comment Posted | Notify user that a comment has been posted to their Connect Profile. The email will contain text from Comment left on Profile. | Connect |

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| New Posting Added - Subscribed Author | New posting has been added by your subscribed author | Connect |

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| New Posting Added - Subscribed Topic | New posting has been added in a subscribed topic | Connect |

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| New Posting added to Blog/Podcast/Webcast | Notify users who are subscribed to a Blog, Podcast or Webcast, that a new posting has been added. | Connect |

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| Posting Has Been Modified | Notify users who are subscribed to the posting, that the posting has been modified. All Posting types are recognized for this email trigger. | Connect |

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| Question Answered | Expert has answered a question in Connect | Connect |

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| Question Asked in Area of Expertise | User has posted a question in Connect | Connect |

ILT Administration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Advanced Registration Closed | Advanced registration expires | ILT Administration |

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| --- | --- | --- |
| Advanced Registration Open | Advanced registration is open for interested users | ILT Administration |

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| Cancel Session | ILT Session is cancelled. This email will only fire for current/upcoming sessions and will not fire if the session dates were in the past when the session was cancelled.  The REASON.CANCEL.SESSION tag is available for the Cancel Session email so that the reason entered by the administrators when the session was cancelled can be included in the email. This tag will display the reason selected in the drop-down by the administrator who cancelled the session. | ILT Administration |

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| Deny Facility Request | When a Facility/Location is requested for an Event/Session, a Facility Details window appears. Within this window is a Confirmation Required column with a selection box to require the location to be confirmed before the Session is approved. This email will fire to the selected recipients when the Event/Session is requested, followed by a denial from the administrator at the Facilities & Resources/View Facilities Requests function. | ILT Administration |

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| Deny Instructor's Request | Instructor denied request for a Session | ILT Administration |

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| Deny Resource Request | In the Facilities & Resources/View Resource Requests functions, an administrator can view and respond to all Resource Requests. This email will fire once a Request is Denied. | ILT Administration |

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| Grant Facility Request | When a Facility/Location is requested for an Event/Session, a Facility Details window appears. Within this window is a Confirmation Required column with a selection box to require the location to be confirmed before the Session is approved. This email will fire to the selected recipients when the Event/Session is requested, followed by approval from the administrator at the Facilities & Resources/View Facilities Requests function. | ILT Administration |

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| Grant Instructor's Request | Instructor grants request for a Session | ILT Administration |

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| Grant Resource Request | In the Facilities & Resources/View Resource Requests functions, an administrator can view and respond to all Resource Requests. This email will fire once a Request is Granted. | ILT Administration |

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| ILT Session becomes Available | Session is approved and available for enrollment. If this email is created with a Send To of "Interested users," it will trigger an email to users on the Interest Tracking list if the users are included in the session availability criteria for the session when that session is created. | ILT Administration |

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| ILT Session Marked as Completed | Instructor marked Session as completed | ILT Administration |

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| Prerequisite is Due | Prerequisite is due for a Session | ILT Administration |

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| Registration Deadline | ILT Session registration deadline | ILT Administration |

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| Request Facility | Within the Session Schedule set-up, it is required to Request a Facility/Location for a Session. This email is fired upon request. | ILT Administration |

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| Request Instructor | This email is triggered when an instructor is requested (added or updated) for a session. This setting is configured when defining a part for a session. This email is triggered in the following conditions: a new session is created with an instructor, the schedule/location of an existing session is modified, the min/max number of participants accepted for the session is modified, the no-show penalty is changed or the session price is changed. | ILT Administration |

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| Request Resource | In the Facilities & Resources/View Facilities Requests functions, Resources (projectors, chairs, etc.) can be applied to each Facility. Once Resources are set-up, they can be applied to a Session when creating/editing an Event/Session. When editing or creating a Resource, there is a box for an Approval Required selection. If this is selected, this email will fire to recipients such as the Resource owner or Session Contact for approval upon request. | ILT Administration |

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| Request Webcast Instructor | Request Webcast instructor for a Session | ILT Administration |

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| Session Changed | The Session Changed email is triggered if the following session fields were changed: Part Name, Part Description, Advanced Registration Settings, Instructor, Location, No Show Penalty, Pre-work/Post-work/Prerequisite Details, Session Charge Date, Start or End Dates and Times, and Waitlist Deadlines.  The following conditions can be used with this email:   * CURRENT.REGISTRATION, MAX.REGISTRATION, MIN.REGISTRATION * NO.SHOW.PENALTY.CHANGED - Will be triggered when the no-show penalty is changed * PRICE.CHANGED - Will be triggered when the session price is changed * SCHEDULES.CHANGED - Will be triggered when any of the following fields are changed: part name, description, location, room layout, resource, instructor, start/end date/times, display times in time zone of user toggle, time zone, part break, part occurrence, pre-work, post-work * TIMETABLE.CHANGED - Will be triggered if any of the following fields are changed: location, start/end date/times, time zone, part occurrence * INSTRUCTOR.CHANGED - Will be triggered if an instructor is added or removed from a session (changing an instructor from primary to secondary does not trigger the email) * PRE.POST.TRAINING.CHANGED - Will be triggered if a pre-work or post-work is added, removed, or made mandatory (if it is made optional, the email is not triggered) * The COMMENT tag is relevant in combination with this condition. It displays the comments entered by the session administrator or instructor when the changes for this session were saved   This email is sent when the following conditions are met:   * The session is in an Approved status * The last part of the session is not yet finished   When using the condition TIMETABLE.CHANGED or INSTRUCTOR.CHANGED, the email is only triggered if the change concerns at least one current or future part  Note: When the Session Changed email is configured as a meeting invitation, the email will only trigger for parts that are current or in the future. | ILT Administration |

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| Session End Date | ILT Session end date | ILT Administration |

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| Session Post-work Due Date | This email is triggered by the due date of the session post-work. The email is sent to all users indicated in the email regardless of post-work completion status. For this email trigger, there is an option to indicate which parent the pre-work/post-work email is generating from.   * A separate email is fired for each individual post-work item. * POSTWORK.TITLE is available to reference the title of the training item that is due. With this tag, administrators can create emails notifying the users of the courses that are due and the Sessions that they are associated with. | ILT Administration |

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| Session Pre-work Due Date | This email is sent to a student a specified number of days prior to the start of an ILT session if they have not yet completed the session's pre-work assignments. If all pre-work is completed by the student prior to the trigger date for the reminder, the email is not sent to that student. If one or more pre-work assignments are not yet complete, however, the email reminder fires to the student. For this email trigger, there is an option to indicate from which parent the pre-work/post-work email is generating.   * A separate email is fired for each individual pre-work item. * The PREWORK.TITLE tag is available to reference the title of the training item that is due. With this tags, administrators can create emails notifying the users of the courses that are due and the Sessions that they are associated with. | ILT Administration |

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| Session Start Date | ILT Session start date.  Use Case: Use this trigger to remind users of the start date for a session for which they are registered. If configuring the Session Start Date email as a reminder, select "Reminder" in the Type field drop-down. Then, determine when the email should be sent by configuring the number of days/hours to send the email before the session's start date. Also, in the Send To field, be sure to send the email to "Registered Students."  The WITHDRAW.SESSION.LINK email tag can be added to Session Start Date emails via Email Administration. When learners receive an email using this tag, they will see a link instead of a tag. Clicking this link navigates them to the Cancel Registration page for the selected event. | ILT Administration |

Default Password Administration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Default Password Email Reminder Template | This email trigger can be used as a reminder when the default password is nearing expiration. This email is triggered a certain number of days before the default password expires. Administrators can configure when the email is triggered in relation to the default password expiration date. The emails are queued when the default password is set, so it is important to configure this email trigger prior to setting the default password. This email can be configured as a Reminder type email. This email can be sent to a specific administrator user. | Default Password Administration |

Instructor Led Training Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Approve ILT Session | Approval settings can be set within the Event/Session or within the user details page. If approval is required, the requested training will remain in pending approval status until the approver approves, defers, or denies the request. This email is fired when an Approver approves a request for an ILT session. This email can be used to notify the student that the request has been approved or to notify a particular approver in the approval workflow (e.g., Cost center approver or User's manager). | Instructor Led Training |

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| Assign ILT Session | This email trigger will fire when a manager assigns an ILT session to users or an administrator uses a learning assignment to assign an ILT session to users. | Instructor Led Training |

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| Cancel Registration (with withdrawal penalty) | In the Event/Session Details step, there is a Penalty for Withdrawal column. There is an Add Withdrawal Penalty link that opens up text boxes to apply a percentage or dollar amount, and the amount of days prior to the Session date when the user cancels, where these would be applied. Once a user withdraws from a Session, the selected recipients will receive this email, and the withdrawal penalty is applied. | Instructor Led Training |

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| Cancel Registration (without withdrawal penalty) | In the Event/Session Details step, there is a Penalty for Withdrawal column. If the Add Withdrawal Penalty is not selected, and the user withdraws from a Session, the selected recipients will receive this email stating that no withdrawal penalty has been applied. | Instructor Led Training |

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| Deny Exception Request | Once a user has submitted a Grant Exception Request, they will remain in Exception Requested status until an administrator makes the decision to grant or deny the request. Once the ILT administrator denies the user's request, this email will fire to the selected recipients. | Instructor Led Training |

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| Deny Waitlist Request | Once a user has submitted a Waitlist Request, they will remain in Waitlisted status until an administrator makes the decision to grant or deny the request. If the ILT administrator denies the user's request to attend a Session, this email will be triggered. | Instructor Led Training |

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| Exception Request | An Exception Request is created when a user submits a request for an Event/Session in which the prerequisites are not met, or the Event/Session is not available to the user. When this type of request is submitted, the selected recipients will receive this email. Note: Within the Availability step when editing or creating an Event/Session, there is the option to not allow users to request this Session by Exception Request. | Instructor Led Training |

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| --- | --- | --- |
| Grant Exception Request | Once a user has submitted a Grant Exception Request, they will remain in Exception Requested status until an administrator makes the decision to grant or deny the request. Once the ILT administrator grants the user's request, this email will fire to the selected recipients. | Instructor Led Training |

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| Grant Waitlist Request | Once a user has submitted a Waitlist Request, they will remain in Waitlisted status until an administrator makes the decision to grant or deny the request. If the ILT administrator grants a user's request to attend a session, this email will be triggered.  When a user withdraws from a session and a seat becomes available, users on the waitlist are removed from the waitlist, they are granted the option to register for the open seat, and this email is triggered, if enabled. The waitlisted users will see the session on their transcripts in "Registration Pending" status.   * As soon as one of the user registers, all other users are moved back to the waiting list. In this scenario, if another user withdraws, the process is completed again for the users remaining on the waitlist. * If none of the users register, the previously waitlisted users are not moved back to the waiting list. In this scenario, if another user withdraws, since no users are on the waiting list in that moment, this email is not triggered.   When a user withdraws from a session after the registration deadline, this email is not triggered. | Instructor Led Training |

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| ILT Session Marked as Complete | This email can be used to notify users that an ILT session has been marked complete. | Instructor Led Training |

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| ILT Session Register | Once a user registers for an ILT session, this email can be sent to the student, approvers, assignors, instructors, and anyone else who would need information about the registered session. This email will not be triggered after the session start date, regardless of the session end date.  This email does not include Accept or Deny options when it is sent as a calendar invitation because this email does not interact with the Cornerstone system. It is designed to only allow recipients to save the session to their calendar. | Instructor Led Training |

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| ILT Session Seats Available | The ILT Seats Available is sent to users when session seats are available when the following are true:   * The Allow Auto Management of Waitlist option is turned off for the session. * The waitlist deadline is before the registration deadline, and the registration deadline has not yet passed. | Instructor Led Training |

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| ILT Session Substitution | This email is fired to selected recipients when a user is withdrawn from an ILT Session, and another user has been registered as a replacement. | Instructor Led Training |

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| Request ILT Session | This email trigger will fire when a user submits a request for an ILT session. This trigger can also be set up to keep session instructors, administrators, and session contacts informed with the details of the session.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Instructor Led Training |

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| Session Start Date | ILT Session start date.  Use Case: Use this trigger to remind users of the start date for a session for which they are registered. If configuring the Session Start Date email as a reminder, select "Reminder" in the Type field drop-down. Then, determine when the email should be sent by configuring the number of days/hours to send the email before the session's start date. Also, in the Send To field, be sure to send the email to "Registered Students."  The WITHDRAW.SESSION.LINK email tag can be added to Session Start Date emails via Email Administration. When learners receive an email using this tag, they will see a link instead of a tag. Clicking this link navigates them to the Cancel Registration page for the selected event. | ILT Administration |

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| Session Transcript Status Changed by Roster Submission | This Event is fired for each user separately by the instructor submitting the roster. This Event will only be fired for users whose Session transcript statuses have changed. For required evaluations attached to ILT sessions, you can configure this email trigger to automatically notify users as soon as the roster is updated and the session marked complete.  In this trigger, you can set a condition so that the email is only triggered when the student's status is changed to a specific status. For example, you can set the condition in the following syntax:   * STUDENT.TRANSCRIPT.STATUS==TRANSCRIPT.STATUS.[Enter the desired status here (e.g., NOSHOW, PENDINGEVALUATION)]   If the PENDINGEVALUATION status is used, then as soon as a user's attendance is updated on the roster and session marked complete, the user's transcript status changes to Pending Evaluation, (if the evaluation is marked as required) and this causes the email to fire to the user. | Instructor Led Training |

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| Waitlist Acceptance Deadline | Within the Session Details is a column called Waitlist Deadlines. In this column, the admin can set up a waitlist acceptance deadline within days and hours of the Session start time, purpose being to place an expiration time for the waitlist before the Session starts. This email will fire to let the user know a seat will not become available in the requested Session. | Instructor Led Training |

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| Waitlist Expires | This email is triggered when a waitlist expires before the session start date. | Instructor Led Training |

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| Waitlist Request | When sessions are set up, there is minimum and maximum registration which refers to the amount of seats available. When all seats have been filled, and the session is full, a user is asked if they would like to make a request to be placed into a waitlist. This does not guarantee a seat, but simply allows them to submit the request in case a seat becomes available. The Waitlist Request email will fire to approvers, managers, etc. when the user makes this request. | Instructor Led Training |

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| Withdraw from Waitlist | This email is fired to selected recipients when a user withdraws from a Session waitlist. | Instructor Led Training |

Knowledge Management (Old) Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Knowledge Bank Posting Request | Management User has added a Knowledge Bank posting which requires approval | Knowledge Management |

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| Question Answered | Expert has answered a Knowledge Bank question | Knowledge Management |

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| Question Asked in Area of Expertise | User has posted a question in the Knowledge Bank | Knowledge Management |

License Management Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| License Added | New batch of licenses added. | License Management |

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| --- | --- | --- |
| License Expiration | Occurs when a batch of licenses is going to expire. | License Management |

NASD Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| FINRA Registration Email | Notify the user of FINRA Registration. | NASD |

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| FINRA User Ref Email | Notify the user of FINRA User Ref Number. | NASD |

New Connect Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Assigned Connect Task | This email is triggered when a member of a Connect team is assigned a task within the team. This email can be sent as a notification to Task Assignee, Task Leader, Team Lead, or a specific user. Note: This email may be triggered when a Connect task is created or edited. When editing a task, the email is not triggered unless the task assignee is modified. | New Connect |

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| Connect Team Feed User Update | This email is triggered when a member of a Connect team posts a user update to the Team Feed. This email can be sent as a notification to Team Members, Team Lead, or a specific user. Note: This email is triggered when a parent post is created, whether it is posted directly from the Team Feed page or through the Live Feed page. Any attached files or links from the user update do not display in the email. | New Connect |

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| Connect Team Invitation | This email is triggered when a user receives an invitation to a Connect team. This email can be sent as a notification to Invitation Recipient or a specific user. | New Connect |

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| Joined Community | This email is triggered when a user becomes a member of a community. This email can be sent as a notification to New Member, Community Moderator, or a specific user. Note: For invitation only communities, this email is triggered when the user joins the community. For automatic enrollment communities, this email is triggered when the community settings are saved with the user being added to the availability criteria. | New Connect |

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| Knowledge Bank/Communities New Completed Suggestion | This email is triggered when a suggestion posting is marked as Completed in the Knowledge Bank or a community. This also applies when a posting is marked as Completed, then unmarked as Completed, and then marked as Completed again. This email can be sent as a notification to Posting Creator, Community Moderator, or a specific user. | New Connect |

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| Knowledge Bank/Communities New Featured Posting | This email is triggered when a posting is marked as featured in the Knowledge Bank or a community. This email can be sent as a notification to Posting Creator, Community Moderator, Community Members, or a specific user. Note: This email is triggered any time a posting is marked as featured, even if the posting was unmarked and then remarked as featured. A recipient must match the following criteria to receive the email:   * User is within the availability criteria for the corresponding posting's parent topic. * User is within the constraints of the posting's parent topic's creator constraints. * User is a member of one of the communities with which the topic is shared. | New Connect |

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| Knowledge Bank/Communities New Posting Created | This email is triggered when a new Knowledge Bank or community posting is created. This email can be sent as a notification to Community Moderator, Community Members, Follower, or a specific user. A recipient must match the following criteria to receive the email:   * User is within the availability criteria for the corresponding posting's parent topic. * User is within the constraints of the posting's parent topic's creator constraints. * User is a member of one of the communities with which the topic is shared. | New Connect |

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| Knowledge Bank/Communities Question Answered | This email is triggered when a Q&A posting is marked as Answered in the Knowledge Bank or a community. This also applies when a posting is marked as Answered, then unmarked as Answered, and then marked as Answered again. This email can be sent as a notification to Community Moderator, Posting Creator, or a specific user. | New Connect |

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| Knowledge Bank/Communities Question Asked | This email is triggered when a Q&A posting is created in the Knowledge Bank or a community. This email can be sent as a notification to Expert, Community Moderator, or a specific user. | New Connect |

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| Knowledge Bank/Communities Reply | This email is triggered when a user replies to a posting in the Knowledge Bank or a community. This email can be sent as a notification to Author, Community Moderator, Community Members, Follower, or a specific user. If the reply is added directly to the posting, then Author refers to the posting creator. If the reply is added to another reply, then Author refers to the posting creator and the author of the original reply. Note: This email is triggered even if the same user makes multiple replies to the same posting. | New Connect |

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| New Connection Request | This email is triggered when a user receives a connection request. This email can be sent as a notification to Request Recipient or a specific user. Note: This email is only triggered for connections within New Connect, not Old Connect. | New Connect |

Other Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Copy Down Scheduled | A copy down completely copies your database from one environment to another. The Copy Down Scheduled email is triggered when a copy down is scheduled in the environment in which the email is enabled. This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled. For example, if a copy down is scheduled in Pilot from Production, the email is only triggered if the email is configured in Pilot. This email trigger ignores deadbox settings.  The following tags are available for this email trigger:   * DESTINATION.ENVIRONMENT * PORTAL.NAME * RECIPIENT.FIRST.NAME * RECIPIENT.LAST.NAME * REQUESTOR.EMAIL * SCHEDULE.DATETIME * SOURCE.ENVIRONMENT   It is highly recommended that the portal name, source environment, and destination environment email tags are included in the email body to ensure it is clear which portals and environments are being impacted by the copy down. | Other |

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| Login Message Email | This email is triggered when a recipient clicks an Action button that is configured in a login message to send an email to the recipient. The Login Message Email can only be added to login messages, which are configured in Login Message Preferences. | Other |

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| Recurring Billing Processor Event | This email is triggered when a user renews a subscription from the transcript page or when a manager assigns a curriculum extension to a user through inventory. This email can be sent to a specific user or the person in the Purchaser role. The user's manager can be copied on the email. | Other |

Self Registration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Activation Email | This email is sent to users who submit a registration for a self-registration group that requires email verification. To include a link that the user will click to verify their email address for the self-registration, the following tag must be included in the body of the email: EMAIL.VERIFICATION.LINK  This tag will update with the self-registration email verification link automatically when the user receives the email. | Self Registration |

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| Deny User Record | This email is triggered by the user record approver denying a record. | Self Registration |

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| User Approve Record | This email is triggered when a self-registered user record is approved. If self-registration user records do not require approval, then this email is triggered immediately. If approval is required, then this email is triggered when the user record is approved. This email can be sent to User, User's Approver, or User's Manager. | Self Registration |

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| User Record Request | This email is triggered by a self-registered user submitting their user record for approval. | Self Registration |

System Administration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Admin Password Change | This email is triggered when an administrator manually resets a user's password. The user's new password cannot be included in the email. Because of this, the administrator must communicate this password outside of the system. This email can be sent to User or User's Manager. | System Administration |

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| Effective Dating Error | This email is triggered when a user record change that was set with a future effective date attempts to process and an error is generated. The email can be sent as a notification to User, User's Manager, User's Approver, or a specific user.  The EFFECTIVE.DATING.ERROR.DESCRIPTION tag can be included in the email message to include the description of the effective dating error. If there are multiple errors, then each error description is displayed on its own line in the message. | System Administration |

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| Forget Password | If the Password Reset Option in Password Preferences is set to Reset By Email Notification, then the Forget Password email is triggered when a user clicks Forgot Password? on the Login page. This email can be sent to External User or Internal User. If the user clicks Forgot Password? multiple times and a password reset URL is included in the email, then a new URL is generated for each email and the previous URL is no longer valid.  This email must be configured for administrators to select the "Send Password Reset Email to user's email address" option when resetting a user's password on the Admin - Users page.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Defining Availability  The availability settings do not apply to external users when External User is added as a recipient in the Send To field.  When Internal User is added to the Send To field, the availability settings defined in the Availability field apply to internal users based on the organizational unit (OU) to which they belong. The following rules apply by OU:   | Organizational Unit | Rule | | --- | --- | | Cost Center | Cost Center if user is part of the Cost Center | | Custom Group | Custom group if user is part of the Custom Group | | Division | Division user belongs to | | Grade | Grade user belongs to | | Location | Location user belongs to | | Position | Position user belongs to | | Self-Registration Group | Self-Registration group if user is part of the group | | User | User if user is added individually | | System Administration |

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| LAT Draft Review | This email is triggered when a learning assignment draft is created, and the following are true:   * The High User Count threshold is exceeded * The Restrict Submission setting is enabled * The administrator who created the draft does not have permission to submit the draft   This email is triggered an additional time if an administrator edits and saves the same draft if all of the criteria are still true.  Example 1: Administrator A creates a draft assignment with a user count that is above the High User Count threshold, but the Restrict Submission setting is disabled. The email is not triggered.  Example 2: Administrator A attempts to create a learning assignment that exceeds the High User Count threshold, and the Restrict Submission setting is enabled. Administrator A does not have permission to submit draft assignments. Administrator A receives the High User Count restriction and the can only save the assignment as a draft, and this triggers the LAT Draft Review email.  This email can be configured to be sent to Draft Reviewers or specific users. When this email is sent to Draft Reviewers, this includes all administrators who have the Assignment Tool - Submit Draft permission regardless of permission constraints. Administrators may further restrict the recipient list by adding specific users or by restricting with availability. | System Administration |

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| New User Record Created (via Add User Page) | This email can be configured as a notification and is triggered when a new user record is created via the Admin - Users page. This email is not sent to users who are created via a data feed. This email can be sent to the User Created, User Creator, or the User's Manager.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL. | System Administration |

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| Scheduled Report Complete | Scheduled Report is complete | System Administration |

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| Training Deactivation | This email is triggered when a training item is about to be deactivated. This email is only triggered when the course is set to deactivate on a specific date via the Deactivate this course setting in the Course Catalog > General settings. This email is not triggered when the course is deactivated by via the Active checkbox. The email can be sent to Training Contact and Training Owner. This email can be configured as a Reminder type email. This email is active by default and can be found in the System Administration action type section of Email Management.  Use Case: An administrator would like to be reminded that a training item is set to deactivate on December 31st. The Training Deactivation email is configured to trigger one week before the training item deactivates. When the administrator receives the email, the administrator reviews the training item to determine whether or not to reset the deactivation date, allow the course to become inactive, or remove the deactivation settings altogether. | System Administration |

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| Updated Training | Training has been updated to a new version, or pre-work, post-work, or a prerequisite is has been updated or added to the LO.  This is triggered by the user getting automatically updated to a new version of a LO. This email is only triggered by updates to LOs that are versioned, such as an online course, material, test, or curriculum. This email will not trigger for child LOs when they are versioned; in case of child LO versioning, the email will only trigger for the curriculum on the user's transcript.  The TITLE tag enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO.  The MATERIAL.START.DATE tag displays the material's start date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email.  The MATERIAL.END.DATE tag displays the material's end date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email. | System Administration |

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| User Password Change | This email is triggered any time a user changes their password. This email can be sent to User or User's Manager. | System Administration |

Test Engine Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Test Grading Notification | Notify the Test Grader of pending grade. | Test Engine |

Training Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Approve Training Request | This email is triggered when an approver approves a student's request for an online class, quick course, event, curriculum, library, posting, test, external training, material, or cohort. The available recipients for this email are Training request approvers, Assignor of the training, Cost center approver, Cost center owner, User's manager, or Student. | Training |

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| Assign Evaluation Task | The Assign Evaluation Task email is triggered for each individual student either 30, 60, or 90 days after the course was completed by that user. The date that this email is triggered is now the same date that the level 3 course evaluation task appears in the user's Scheduled Tasks area.  The Assign Evaluation Task email is only triggered for courses that have a level 3 course evaluation task activated. | Training |

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| Assign Survey Task | Process Assign Survey Task email. When an administrator creates a new survey task, they select which users will be assigned the survey task. When the task is created and saved, an email is sent to the selected users (Assessors assigned to a task). | Training |

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| Assign Training | The Assign Training email is designed to fire when a user is assigned an online class, quick course, event, curriculum, posting, test, video, or material. This email does not fire when a manager or administrator adds external training to a user’s transcript.  However, the Assign Training email trigger is also leveraged during the approval process and will also fire for any learning objects with an approval workflow required and will fire for external training after each approval if approvals are required. The email can be leveraged to notify the next approvers they have an approval waiting for the learning object. If there are multiple approvals required, this email will fire multiple times.    Note: If the user currently has a previous version of the training on his transcript and the previous version is version equivalence of its next version, the user will not get the 'Assign Training' email on the assignment of the next version. | Training |

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| Charge Credit Card | Confirmation of credit card charge. This email is triggered when the user goes through the registration and purchasing process, and the purchase has been finalized. | Training |

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| Defer Training Approval Request | Email will fire when Approval has been deferred to the next approver. The intended recipient is the next approver. If no additional approver is assigned, the email will not fire.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Deny Training Request | Once a user requests training, the system will check for required approvals from the user's approver. If an approval is required, the user's transcript will show a pending approval status. At this point the approver must either approve, defer, or deny the user request. If it is denied the user will receive this email. | Training |

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| Employee Pays | This email is triggered when a user requests training that requires payment. This will let the user know that they must pay to register for the training requested, before the training can be completed. | Training |

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| Evaluation Task Due | Process evaluation task due. This is triggered by the end date of a level 3 post-training course evaluation task. The end date is automatically calculated by adding the evaluation deadline specified on the Add Level 3 Evaluation page to the task start date. | Training |

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| External Training Completion Request | User requests completion of external training course. If a user has an approver, and they mark external training complete, the status will stay in Pending Completion status until the approver marks it complete. This email fires to the approver as soon as the user marks external training complete. | Training |

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| External Training is Complete | This email will fire once the user marks external training or free-form training completed. | Training |

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| LO Post work Reminder | This email will serve as a reminder for registered employees to complete Post-work required for various non-ILT learn objects. This trigger works with Tests, Online Courses, Quick Courses, and Materials. When users complete training items that require Post-work, this email can serve as notification for users regarding the required Post work item. | Training |

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| On the Job Training Observer Notification | This email alerts observers when users have requested observation for a specific OJT item. It is triggered when a user clicks the Notify Observer button next to an OJT item on their learning transcript. | Training |

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| Register | User registers for an online course, quick course, library, posting, video, curriculum or external content. This email will fire once the user becomes registered for the training. If the training is set up to be pre-approved and registered upon approval, this email will fire upon request. | Training |

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| Request External Training | User submits request for external training. This email is triggered when user adds external training to transcript.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Request Training | This email is triggered when a user selects the Request button for an event, online class, quick course, curriculum, library, posting, test, or material. This email can be sent to Student, User's manager, Cost center owner, Cost center approver, or Next approver if training request is pending.  This email is triggered even if approval is not required for the training. However, if "Next approver if training request is pending" is selected as the recipient, then the email is not triggered if approval is not needed.  This email is not triggered when an ILT session is requested. For ILT sessions, the Request ILT Session trigger should be used.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Request Webcast | User submits request for a webcast session. This email is triggered when a webcast session within an event is requested by a user.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| SF-182 Form Approval Step Response | This email is triggered when an approver approves or denies an SF-182 request. The email can be sent to the following recipients:   * Next approver if training request is pending (Note: Selecting this recipient sends the notification to all approvers defined in the approval step.) * Cost center approver * Cost center owner * User's manager * Student | Training |

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| SF-182 Form Approved | This email is triggered when the final approver approves the request or if there were no approvers available to approve the request. The email can be sent to the following recipients:   * Cost center approver * Cost center owner * User's manager * Student | Training |

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| SF-182 Form Denied | This email is triggered when an approver denies the request. The email can be sent to the following recipients:   * Cost center approver * Cost center owner * User's manager * Student | Training |

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| SF-182 Form Completion Documentation Submitted | When users add completion documentation to their SF-182 request, they have the option to send an automatic email to the approver, to notify the approver of the addition. The SF-182 Form Completion Documentation Submitted email is the email that is sent to the approver in this case.  For more information about adding completion documentation to a request: See SF-182 Forms - Add Completion Evidence. | Training |

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| SF-182 Form Submitted | This email is triggered when an administrator, manager, or user submits an SF-182 request. The approval notification is sent to the first approver if an approval workflow is configured for the request. The email can be sent to the following recipients:   * Next approver if training request is pending (Note: Selecting this recipient sends the notification to all approvers defined in the approval step.) * Cost center approver * Cost center owner * User's manager * Student | Training |

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| Survey Task Due | Process Survey Task Due email. This email works with the dates placed in the Date: section when creating a new survey task. The Reminder email type can be set up to remind the user within days, hours, or minutes before or after the survey task is due. | Training |

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| Training Approval Reminder | Confirms or reminds that one or more approvers must approve or deny a training request. This email trigger is different from the Request Training trigger because it is available for sessions and can be sent to the same user repeatedly when configured as a reminder until the user completes the action identified in the email. The trigger fires when the following is true:   * When configured as a Confirmation type email, this email is only triggered when the training status is Pending Approval. This email is not triggered if the training has already been approved. Email stops being sent to an approver who has approved or denied the request. * The training status is Pending Approval and a custom relationship is updated on the user record. Even if the custom relationship is not part of the existing approval workflow, the system recognizes that the custom relationship hierarchy has changed and will re-trigger the email to the approver that is designated in the approval template.   When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Training Completion Request Approved | Approver approves a training completion request. | Training |

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| Training Completion Request Denied | Approver denies a training completion request. | Training |

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| Training Completion Request | User requests completion of a training course.  When the APPROVE.DENY.DEFER.LINKS tag is included in the email, this tag displays the Approve, Deny, and Defer deep links within the body of the email. Note: The Defer option is only available when enabled in the portal.   * When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page if the organization is using single sign on (SSO). The approver can then enter the appropriate comments and submit the response. If the organization does not use SSO or if the user is outside the organization's firewall, then the user is directed to the Login page. * If the approver does not have permission to approve, deny, or defer the training, the approver is directed to an Access Denied page. | Training |

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| Training Exemption Request | When a user submits an exemption request, a confirmation, notification, or reminder email can be sent to a user or the user's manager. The email trigger is active by default. | Training |

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| Training Exemption Response | When a manager submits a response to a direct report's exemption request, a confirmation, notification, or reminder email can be sent to a user or the user's manager. The email trigger is active by default. | Training |

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| Training is Available | This email is triggered when the available date is reached for a learning object in which the user has been assigned via a learning assignment. This email can be sent to Student or User's Manager. This email can be configured as a Notification type email. This email can be found in the Training action type section of Email Management.  Use Case: Use this trigger to send notifications to students when the training in which they are assigned is available to complete. | Training |

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| Training is Completed | This email will fire once the user has successfully completed a session, online class, quick course, curriculum, library, posting, test, or material.  To include a link to an associated Level 1 evaluation within the Training is Completed email, enter the tag, EVALUATION.LEVEL1, into the email body. When the email is sent to a user, the tag text is replaced by the link to the evaluation associated with the training item the user completed. The user can click this link to access and complete the Level 1 evaluation. Note: If no evaluation is associated with the training that was completed, the tag is removed from the email body and no content displays in its place.  Note: If no evaluation is associated with the completed training, the tag is removed from the email body and no content displays. Also, if the evaluation is completed prior to the email triggering, the tag is removed from the email body and no content is displayed. | Training |

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| Training is Due | Occurs when training is due. When a due date is applied to training, this email can be configured to fire before or after the training due date. The Reminder email can be set up to remind the user within days, hours, and minutes before or after the training is due. This email can be sent to Training request approvers, Assignor of the training, Cost center approver, Cost center owner, User's manager, or Student.  This email trigger will not fire for training that is in a Completed status. | Training |

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| Training Marked Exempt | When a manager or administrator marks an LO Exempt, a confirmation, notification, or reminder email can be sent to a user or the user's manager. The email trigger is active by default. | Training |

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| Training Plan Assigned | This email is triggered when a training plan is assigned and is triggered on the first day of the access period for a user who is a plan contributor or plan manager. The administrator can set a reminder before or after the training is assigned. If a planner's access period is changed, the user receives a new Training Plan Assigned email corresponding to the new start date of the access period. | Training |

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| Training Plan Due | This email is triggered on the last day of an access period for a plan contributor and also on the last day of a plan manager segment for a plan manager. The administrator can set a reminder before the due date arrives. | Training |

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| Training Plan Removed | This email is triggered when a plan contributor or manager is manually removed from a training assignment via the View Details page. This email is also triggered when a plan contributor segment or plan manager segment is removed from the plan. | Training |

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| Training Plan Submitted | This email is triggered when a plan contributor's training plan is submitted. | Training |

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| Training Removed from Transcript | If enabled, this email is triggered when an administrator removes a training item from a user's transcript. This email is also triggered when a training item is dynamically removed because the user was dynamically removed from a dynamic learning assignment. | Training |

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| Training version is Effective | This email is triggered when the Start Date is reached and the training becomes effective. Start Date is an Append Versioning option. This email can be sent to the Assignor of the training, the student's manager, the student, or a specific user. | Training |

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| --- | --- | --- |
| Transcript Status Edited | When an administrator edits the user's transcript such as pricing, completion, due dates, etc., this email will be sent. | Training |

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| Transcript Updated | This email can be configured as a notification. When configured as a notification, this email is triggered when a transcript is updated via Data Merge. Either training records must be moved or an account should be deactivated for the email trigger to be activated. This email trigger is in the Training Action Type. This trigger can be sent to Destination User's Manager, Source User's Manager, Destination User, and Source User. | Training |

Training Form Management Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Submit Training Form | User submits a training form. | Training Form Management |

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| --- | --- | --- |
| Training Form Approved | User's training form marked Approved by an Approver. | Training Form Management |

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| --- | --- | --- |
| Training Form Denied | User's training form marked Denied by an Approver. | Training Form Management |

|  |  |  |
| --- | --- | --- |
| Training Form Task Assigned | Training form task assigned. | Training Form Management |

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| --- | --- | --- |
| Training Form Task Due | Training form task due. | Training Form Management |

Training Unit Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Training Unit Keycode: Monthly Balance Email | The email is triggered by the following:   * The Send monthly balance to training unit contact option is selected in Training Unit Preferences. The email provides recipients with the training unit balance and is sent on the last day of each month.   At least one training unit contact must be a recipient, and the email can also be sent to specific users. When sending the email to a specific user, at least one training unit contact must be included as a recipient. If there are no training unit contacts included as recipients, then the email does not fire.  Note: The email must be enabled in Training Unit Preferences for the training unit contact's division.  Note: The training unit contacts that are recipients of the email are dependent upon the OUs for which the email is enabled in Training Unit Preferences. For example, if the email is enabled for Division A but not for Division B, then the email is only sent to training unit contacts in Division A.   * A new training unit key code is purchased through the Shopping Cart feature. The email is sent to the training unit contact when the action occurs.   Note: If the training unit is purchased using a purchase order and the transaction is in a Pending Payment status, then the email is not triggered until the transaction is marked Completed in Manage Transactions. See Manage Transaction Overview for additional information. | Training Unit |

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| Redeemed Training Units (KeyCode) | This email is triggered each time a key code is used. This email can be sent to a specific user, the TU Contact, or the TU Redeemer. | Training Unit |

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| --- | --- | --- |
| Training Unit Distribution Assigned (Distributor) | This email is triggered each time a distributor assigns training units to end users. This email can be sent to a specific user, the TU Recipient, the TU Creator, or the TU Distributors. | Training Unit |

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| --- | --- | --- |
| Training Unit Distribution Created (Distributor) | This email is triggered each time a training unit key code distribution is created, which can be an addition to an existing key code or the creation of a new key code. This email can be sent to a specific user, the TU Creator, or the TU Distributors. | Training Unit |

|  |  |  |
| --- | --- | --- |
| Training Unit Distribution Created (KeyCode) | This email is triggered each time a training unit key code distribution is created, which can be an addition to an existing key code or the creation of a new key code. This email can be sent to a specific user, the TU Creator, or the TU Contact. | Training Unit |

|  |  |  |
| --- | --- | --- |
| Training Unit Distribution Expires (Distributor) | This email is triggered each time a training unit key code distribution expires. This email can be sent to a specific user, the TU Creator, or the TU Distributors. | Training Unit |

|  |  |  |
| --- | --- | --- |
| Training Unit Distribution Expires (KeyCode) | This email is triggered each time a training unit key code distribution expires. This email can be sent to a specific user, the TU Creator, or the TU Contact. | Training Unit |

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| --- | --- | --- |
| Training Unit Expires | This email is triggered as a reminder that training units are scheduled to expire. This email can be sent to a specific user or the TU Recipient. | Training Unit |

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| --- | --- | --- |
| Training Unit Revoked (Distributor) | This email is triggered each time a distributor revokes training units from end users. This email can be sent to a specific user, the user whose TU has been revoked, or the user who revoked the TU. | Training Unit |

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| --- | --- | --- |
| Training Units Adjustment Email (KeyCode) | This email is triggered each time a key code balance is adjusted. This email can be sent to a specific user, the TU Creator, or the TU Contact. | Training Unit |

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| --- | --- | --- |
| Training Units Low Balance Notification (KeyCode) | This email is triggered when a key code balance reaches or falls below the predetermined balance set on the Training Unit Preferences page for the training unit redeemer. This email can be sent to a specific user, the TU Creator, or the TU Contact. Note: The balance that triggers this email is the balance set in the training unit redeemer's OU settings. | Training Unit |

Universal Profile Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Badge Provided Notification | This email is triggered when an employee provides a badge for another employee on their Universal Profile - Feedback page. This email is not triggered for the Completed Goal post. This email can be sent as a notification to Feedback Recipient, Feedback Recipient's Manager, or a specific user. | Universal Profile |

|  |  |  |
| --- | --- | --- |
| Feedback Provided Notification | This email is triggered when an employee provides feedback for another employee on their Universal Profile - Feedback page. Feedback can be provided by posting directly to the Feedback page or by commenting on a Feedback post. This email is not triggered when the manager provides feedback to a direct report that is only visible to the user's manager. This email can be sent as a notification to Feedback Recipient or a specific user. | Universal Profile |

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| --- | --- | --- |
| Feedback Request Notification | This email can be configured as a notification and is triggered when an employee requests feedback from their Feedback page. This email can be sent to a specific user, the Feedback Request Recipient, the Feedback Requester, or the Feedback Requester's Manager. | Universal Profile |

Additional Email Triggers

A full list of all email triggers is also available. See Email Triggers on page 154 for additional information.

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

Email Triggers for Performance

This page contains email triggers that may apply to organizations using the Performance solution.

Compensation Management Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Compensation Overall Task Completion | This email is triggered when the entire compensation task is completed for all assigned user. | Compensation |

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| --- | --- | --- |
| Compensation Task Approval Denied | This email is triggered when a compensation task is denied by the approver. This email is sent to the Compensation Manager. | Compensation |

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| --- | --- | --- |
| Compensation Task Assigned | User is assigned to a compensation task | Compensation |

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| --- | --- | --- |
| Compensation Task Completion | This email is triggered when a compensation task is completed for a user, including all approvals. | Compensation |

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| --- | --- | --- |
| Compensation Task Due: Assignee | Compensation task is due for Assignee | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Due: Task Approver | Compensation task is due for Task Approver. This trigger allows administrators to include the task assignee as a tag in the subject and body of the emails. This enables approvers who receive the emails to easily identify whose compensation task requires approval.  The task assignee tag (ASSIGNEE.NAME) is only available for use in the subject and body of the affected emails. This tag displays the full name of the user who is assigned the task. | Compensation |

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| --- | --- | --- |
| Compensation Task Edited | This email notifies compensation managers (or other task assignees) that their submitted compensation plan has been edited by an approver during the approval workflow. The following actions trigger the email:   * An approver edits any component in the compensation plan during the approval workflow and saves the plan. * The approver edits any component in the compensation plan during the approval workflow and subsequently approves or denies the plan. | Compensation |

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| --- | --- | --- |
| Compensation Task Request Approval | Users requests approval for compensation task. This trigger allows administrators to include the task assignee as a tag in the subject and body of the emails. This enables approvers who receive the emails to easily identify whose compensation task requires approval.  The task assignee tag (ASSIGNEE.NAME) is only available for use in the subject and body of the affected emails. This tag displays the full name of the user who is assigned the task. | Compensation |

|  |  |  |
| --- | --- | --- |
| Compensation Task Reset | This email is triggered when a compensation task is reset by the administrator. This email is also triggered when a compensation task resets because the compensation manager is changed for a user. | Compensation |

Default Password Administration Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Default Password Email Reminder Template | This email trigger can be used as a reminder when the default password is nearing expiration. This email is triggered a certain number of days before the default password expires. Administrators can configure when the email is triggered in relation to the default password expiration date. The emails are queued when the default password is set, so it is important to configure this email trigger prior to setting the default password. This email can be configured as a Reminder type email. This email can be sent to a specific administrator user. | Default Password Administration |

Observation Checklist Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Checklist Approval Denied | This email can be configured as a notification. When configured as a notification, the email is triggered immediately after a checklist changes from Pending Completion Approval status to Denied status. The available recipients in the Send To and CC fields are User's Manager, Checklist Verifier, or Assessee. | Observation Checklist |

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| --- | --- | --- |
| Observation Checklist Assigned | This email is triggered when an observation checklist task is assigned. | Observation Checklist |

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| --- | --- | --- |
| Observation Checklist Changed | This email is triggered when the competency model of an observation checklist has changed. | Observation Checklist |

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| --- | --- | --- |
| Observation Checklist Completed | This email is triggered when an observation checklist is completed. | Observation Checklist |

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| --- | --- | --- |
| Observation Checklist Due | This email is triggered as a reminder when an observation checklist's due date is approaching. | Observation Checklist |

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| --- | --- | --- |
| Observation Checklist Pending Completion Approval | This email can be configured as a notification. When configured as a notification, the email is triggered immediately after a checklist changes from In Progress status to Pending Completion Approval status. The available recipients in the Send To and CC fields are User's Manager, Checklist Verifier, or Assessee. | Observation Checklist |

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| --- | --- | --- |
| Observation Checklist Removed | This email is triggered when an observation checklist is removed for a user. | Observation Checklist |

Other Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Copy Down Scheduled | A copy down completely copies your database from one environment to another. The Copy Down Scheduled email is triggered when a copy down is scheduled in the environment in which the email is enabled. This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled. For example, if a copy down is scheduled in Pilot from Production, the email is only triggered if the email is configured in Pilot. This email trigger ignores deadbox settings.  The following tags are available for this email trigger:   * DESTINATION.ENVIRONMENT * PORTAL.NAME * RECIPIENT.FIRST.NAME * RECIPIENT.LAST.NAME * REQUESTOR.EMAIL * SCHEDULE.DATETIME * SOURCE.ENVIRONMENT   It is highly recommended that the portal name, source environment, and destination environment email tags are included in the email body to ensure it is clear which portals and environments are being impacted by the copy down. | Other |

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| --- | --- | --- |
| Login Message Email | This email is triggered when a recipient clicks an Action button that is configured in a login message to send an email to the recipient. The Login Message Email can only be added to login messages, which are configured in Login Message Preferences. | Other |

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| --- | --- | --- |
| Recurring Billing Processor Event | This email is triggered when a user renews a subscription from the transcript page or when a manager assigns a curriculum extension to a user through inventory. This email can be sent to a specific user or the person in the Purchaser role. The user's manager can be copied on the email. | Other |

Performance Management Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Assessment Task Completion | This email is triggered when the entire assessment task is complete, regardless of the task due date. This email can be sent to the assessee or a specific user. | Performance Management |

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| Assessment Task Due Date | Occurs when assessment task is due. | Performance Management |

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| Assessor Assessment Task Assigned | This is triggered when a user is selected as an assessor for a competency assessment task. This email is triggered when an assessor is selected during the task configuration, when assessors are selected by a reviewee from within the competency assessment (when approval is not required), and when a selected assessor needing approval is approved. This email can be sent as a confirmation, notification, or a reminder to Assessor(s) or a specific user. | Performance Management |

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| --- | --- | --- |
| Check-In Created | This email is triggered when a new Check-In series is created. This email can be sent to Check-Ins participants, Check-In creators, or a specific user. | Performance Management |

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| Development Plan Approval Denied | This email is triggered when a development plan approval request is denied. The user receives the email stating that their Development Plan Approval Request is denied. | Performance Management |

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| Development Plan Approval Granted | This email is triggered when a user's development plan is approved. This email is sent to the user who submitted the plan. | Performance Management |

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| --- | --- | --- |
| Development Plan Approval Requested | This email is triggered when a development plan that requires approval has been submitted. The user in the approver role receives the email stating that a new development plan now exists in their list of development plans to approve. If the "Plans must be approved by" preference is not selected, this email is not triggered. | Performance Management |

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| --- | --- | --- |
| Development Plan Assigned | This email is triggered when a development plan has been created by anyone other than the user. The user receives the email stating that a new development plan now exists in their list of development plans. | Performance Management |

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| --- | --- | --- |
| Development Plan Cancellation Approval Requested | This email is triggered when a user attempts to cancel a development plan that has been approved and approval/cancellation approval is required. The approval setting is configurable by OU on the Development Plan Preferences page.  This email is sent to the user in the approver role. If no approver exists, the development plan is automatically cancelled and no email is sent. If the "Plans must be approved by" preference is not selected, this email does not fire. | Performance Management |

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| --- | --- | --- |
| Development Plan Comment Added | This email is triggered when a comment is added to a user's development plan. This includes a comment added to the plan, a comment added to an objective, or when any comment receives a reply. This email is not triggered when the designated email recipient is the user who added the comment. For example, if the triggers is configured to send to the approver and the approver adds a comment to the plan, then this email is not triggered since the intended recipient is the one who added the comment. This email is available within the Performance Management action type, and it can be sent as a Notification to Dev Plan Approver or Dev Plan User.  The following tags are available for this email trigger:   * DEVPLAN.APPROVER.FIRST.NAME - This displays the development plan approver's first name. * DEVPLAN.APPROVER.LAST.NAME - This displays the development plan approver's last name. * DEVPLAN.TITLE - This displays the development plan title. * DEVPLAN.LINK - This displays a link to access the development plan. * DEVPLAN.USER.FIRST.NAME - This displays the development plan user's first name. * DEVPLAN.USER.LAST.NAME - This displays the development plan user's last name. * USER.FIRST.NAME - This displays the recipient's first name. * USER.LAST.NAME - This displays the recipient's last name. | Performance Management |

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| Development Plan Due Date Approaching | This email is triggered when a development plan is due. The user receives the email stating that they have a Development Plan due date approaching. Reminder emails can be set similar to other reminder emails. | Performance Management |

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| --- | --- | --- |
| Development Plan Item Due Date Approaching | This email is triggered when a development plan item (either an action step or training item) is coming due. The user receives the email stating that they have a Development Plan item due date approaching. Reminder emails can be set similar to other reminder emails. | Performance Management |

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| --- | --- | --- |
| External Reviewer Added | This email is triggered when an external user is added to a performance review.  The available recipients are Reviewee, Reviewer Selector (the reviewer who added the external reviewer), and External Reviewer (the external reviewer that was added to trigger the email). | Performance Management |

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| --- | --- | --- |
| External User Assessment Task Assigned | This email is triggered when an external user is assigned as an assessor for a competency assessment task, and this may occur when an assessor is selected during the task configuration, when assessors are selected by a reviewee from within the competency assessment (when approval is not required), and when a selected assessor needing approval is approved. This email can be sent to Assessor(s) or a specific user.  Note: If this trigger is configured as a reminder, it acts as a reminder that the task is assigned. It DOES NOT act as a task due date reminder. | Performance Management |

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| --- | --- | --- |
| Goal Approved | This email is triggered when a user submits a goal or requests to cancel a goal and the request is approved by the approver. | Performance Management |

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| --- | --- | --- |
| Goal Assigned to You | This email is triggered when a goal is created and assigned to a user by anyone other than that user (i.e., this email is not triggered if you create a goal for yourself). The goal owner or goal owner's manager will receive an email stating that a new goal now exists in their list of goals.  The email can contain a link to the Goals page. | Performance Management |

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| --- | --- | --- |
| Goal Cancelled | This email is triggered when a goal is cancelled by someone other than the goal owner. The email can be sent to either the goal owner or the goal owner's manager. If the goal owner cancels their own goal, the email is not triggered.   * The Goal Cancelled email does not fire to the user who initiated the goal cancellation or a user that approved the cancellation. For example, if the goal owner's manager is set as a recipient of this email, they do not receive the email if they cancel the goal of their subordinate. | Performance Management |

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| --- | --- | --- |
| Goal Denied | This email is triggered when a user submits a goal or requests to cancel a goal and the request is denied by the approver. | Performance Management |

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| --- | --- | --- |
| Goal Modification | This email is sent to the goal owner when their goal is modified by another user (e.g., manager, indirect manager). If the goal owner modifies their own goal, the email is not triggered. If only the goal comments or goal attachments are modified, the email is not triggered. | Performance Management |

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| --- | --- | --- |
| Peer Approval Request | This email is triggered when a subordinate creates a peer. This email can be configured as a Notification or Reminder type email to alert the recipient that a approval has been requested for a peer. This email can be sent to User or User's Manager. | Performance Management |

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| --- | --- | --- |
| Performance Review Co-Planner Added | This email is triggered when a co-planner is added to a performance review from within the performance review task by the reviewer OR added by an administrator via the View Details page (if the task is configured to allow reviewers to add co-planners).  The available recipients are Reviewee, Reviewer (the reviewer who added the co-planner), and Co-Planners. Selecting Co-Planners triggers a separate email to all users who are named as co-planners for the task.  For co-planners without access to email, tasks display "Co-planner" at the end of task name for easy identification. | Performance Management |

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| Performance Review Reviewer Commented | This email is triggered when a reviewer adds a comment as part of a discussion thread within an off-cycle performance review. Discussions cannot be part of a standard performance review task.  The available recipients are Reviewee, Reviewer (the commenting reviewer), and Comment Recipients. Selecting Comment Recipients triggers a separate email to all users who have visibility to the comment. For example, a private comment only triggers emails to the reviewee or the person to which the reviewee is replying. A public comment triggers emails to the reviewee and all reviewers. | Performance Management |

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| --- | --- | --- |
| Performance Review Reviewer Declined | This email is triggered when a reviewer declines a review.  The available recipients are Reviewee, Reviewer (the declining reviewer), and Review Selector (the user that selects the reviewers. | Performance Management |

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| --- | --- | --- |
| Performance Review Step Assigned | Performance review of a specific user assigned. This email is triggered when the task step is available for that user to review, which may be triggered by the employee hire date, the previous reviewer submitting the review, or the task assignment date. Note: When customizing this email for a self-review step, this email cannot be sent to "Reviewer" because the system considers this user the reviewee.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step.  This email trigger can be sent to external users. If the REVIEW.LINK tag is used in the trigger and is sent to an external reviewer, then the link takes external reviewers to an external review page that requires no login or validation. See External Reviewers for additional information. | Performance Management |

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| --- | --- | --- |
| Performance Review Step Completed | The Performance Review Step Completed email is only sent to the reviewee regarding other reviewers in the same sequence (if there is any). It is not designed to send email to own reviewer or the person (self) who is completing the review.  This email is not sent to other Reviewers. | Performance Management |

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| --- | --- | --- |
| Performance Review Step Due Date | This email is triggered when a performance review task is due. If this email is sent to the recipient group "Reviewer" then only the users that have received performance reviews will receive the email. This email is conditional so that it only includes the users who are in progress or have not started. Note: When customizing this email for a self-review step, this email cannot be sent to "Reviewer" because the system considers this user the reviewee.  This email can be set up as a reminder to go out before the due date. The reminder will not be sent to reviewers that have already completed the review.  The due date for performance review tasks is defined for each reviewer group on step 2 of creating a performance review task. This date is not necessarily the same as the task end date for it may occur before the task ends. Reviewers will not be locked out of the task on the task due date unless it is the same date as the task end date.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step.  Note: Email Digest emails do not include past-due notifications for optional or locked performance review steps after the step due date. | Performance Management |

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| --- | --- | --- |
| Performance Review Step Reopened | This email is triggered when a performance review step is reopened in order to alert or remind the user that a performance step has been reopened. When configured, this email is triggered any time a step is reopened, whether it is done by a manager or administrator. This email can be sent to Reviewee, Reviewee's Direct Manager, Reviewee's Indirect Manager, Reviewer, or a specific user.  The REOPEN.STEP.COMMENT tag displays the Reason commentary that was provided when the review step was reopened.  The REVIEW.REOPENED.STEP.DUE.DATE email tag displays the due date of the performance review step that is reopened. If no due date is defined for the step, then "No Due Date Defined" is displayed.  The system verifies that the review step is still due prior to triggering the email, so if the review step is no longer due, then this email is not triggered.  Reviewee will not receive any step email other than the self step and Similarly, a reviewer cannot receive any email for a Reviewee step. | Performance Management |

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| --- | --- | --- |
| Performance Review Task Assigned | This email is triggered when the task is assigned to a user. This email is not triggered for a self-review task. However, if the reviewer is specifically named as the recipient of the email trigger, the email is still triggered to that reviewer. For example:   * If the email trigger is configured to be sent to "Reviewee" and John Doe launches a review in which he is the reviewee, he does not receive the email because he launched the review task. * If the email trigger is configured to be sent to "John Doe" and "Reviewee" and John Doe launches a review in which he is the reviewee, he does receives the email because he is named as a specific recipient. | Performance Management |

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| --- | --- | --- |
| Performance Review Task Completed | This email is triggered when a performance review task is completed (i.e., the overall performance review has been completed). This email can be set up as a reminder to go out at a certain time in relation to the completion of the task. The email can also be set up as a confirmation, notification, or promotional email.  This email can be sent to the reviewee, reviewee's manager, the reviewee's indirect manager, or a specific user.  Use Case: An administrator creates an Annual Performance Review task and would like all reviewees to be informed when the performance review has been completed. She configures the Performance Review Task Email to trigger on the date that the last step of the performance review task is due and sets the recipient as "Reviewee." | Performance Management |

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| --- | --- | --- |
| Request Goal Approval | This email is a batch type email that includes a notification for each situation in which a goal owner does the following:   * Creates and submits a goal for themselves when approval is required. * Edits and resubmits a goal that has already been approved. * Attempts to cancel a goal that has been approved when approval is required.   This email is triggered when a user clicks the Send Approval Request button on the My Goals or Snapshot Goals page.  The email is sent to the user in the Approver role. If no approver is set or if goal approval is not required, the goal is automatically approved and no email is sent.  The email can contain a link to the Pending Goals page. | Performance Management |

|  |  |  |
| --- | --- | --- |
| Request Goal Approval | This email is a batch type email that includes a notification for each situation in which a goal owner does the following:   * Creates and submits a goal for themselves when approval is required. * Edits and resubmits a goal that has already been approved. * Attempts to cancel a goal that has been approved when approval is required.   This email is triggered when a user clicks the Send Approval Request button on the My Goals or Snapshot Goals page.  The email is sent to the user in the Approver role. If no approver is set or if goal approval is not required, the goal is automatically approved and no email is sent.  The email can contain a link to the Pending Goals page. | Performance Management |

Succession Management Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| --- | --- | --- |
| Succession Task Assigned | If this email trigger is active when the SMP task is saved, an email is sent to the selected recipients. This email trigger can be sent to the SMP task recipient or a specific user. | Succession Management |

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| --- | --- | --- |
| Succession Task Due | This email is triggered when a Task Owner step is due. This email is not triggered by the overall succession task becoming due. This email will still fire even if the task owner has already completed their SMP task. This email can be sent to the SMP task assignee or a specific user. | Succession Management |

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| --- | --- | --- |
| Succession Task Pdf Notification | This email is triggered when the PDF that is requested from either within a Succession task or from the Scheduled Tasks page is ready to be downloaded. The email includes a link to the PDF so that users can open the PDF directly from the email. If you modify this email, be sure to keep the PDF.LINK tag in the body of the email.  The email can be sent to Requester or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Succession Management action type section of Email Administration. | Succession Management |

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| Succession Task Step Due | This email is triggered when a step (including a Review step) of a Succession Planning task is due. This email can be triggered as a notification or reminder to Assignee or a specific user. | Succession Management |

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| Talent Conference Re-Scheduled | This email is triggered when a talent conference location, date, or time is modified and the talent conference is saved. This email is intended to inform moderators and reviewers of the updated location, date, or time of the talent conference. This email trigger also has a calendar meeting request file attached, which can be saved to the recipient's calendar tool. This email can be sent as a notification to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task.  The following unique tag is available for this email trigger:   * COMMENTS.TO.REVIEWER - This displays any comments that were entered by the moderator for the reviewer on the Talent Conference step of the task. | Succession Management |

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| Talent Conference Scheduling Notification | This email is triggered when a talent conference is scheduled on the Talent Conference step of a Talent Conference succession task. This email is intended to inform moderators or reviewers of the talent conference location, date, and time. This email trigger also has a calendar meeting request file attached, which can be saved to the recipient's calendar tool. This email can be sent as a notification or a reminder to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task.  The following unique tag is available for this email trigger:   * COMMENTS.TO.REVIEWER - This displays any comments that were entered by the moderator for the reviewer on the Talent Conference step of the task. | Succession Management |

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| Talent Conference Summary Sign Off | This email is triggered when a talent conference is signed off. This email trigger enables moderators to notify reviewers that the Sign Off step is completed. This email can be sent as a notification to Moderator, Reviewer(s), or a specific user. The Moderator and Reviewer roles are defined in the Talent Conference SMP task. | Succession Management |

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| Task Review Assignment Notification | This email is triggered when a user is assigned a Task Review step of a Succession Planning task. Note: A Task Review step is assigned when a Task Owner time period expires. This email can be triggered as a notification or reminder to Assignee or a specific user. | Succession Management |

System Administration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Admin Password Change | This email is triggered when an administrator manually resets a user's password. The user's new password cannot be included in the email. Because of this, the administrator must communicate this password outside of the system. This email can be sent to User or User's Manager. | System Administration |

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| Effective Dating Error | This email is triggered when a user record change that was set with a future effective date attempts to process and an error is generated. The email can be sent as a notification to User, User's Manager, User's Approver, or a specific user.  The EFFECTIVE.DATING.ERROR.DESCRIPTION tag can be included in the email message to include the description of the effective dating error. If there are multiple errors, then each error description is displayed on its own line in the message. | System Administration |

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| Forget Password | If the Password Reset Option in Password Preferences is set to Reset By Email Notification, then the Forget Password email is triggered when a user clicks Forgot Password? on the Login page. This email can be sent to External User or Internal User. If the user clicks Forgot Password? multiple times and a password reset URL is included in the email, then a new URL is generated for each email and the previous URL is no longer valid.  This email must be configured for administrators to select the "Send Password Reset Email to user's email address" option when resetting a user's password on the Admin - Users page.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Defining Availability  The availability settings do not apply to external users when External User is added as a recipient in the Send To field.  When Internal User is added to the Send To field, the availability settings defined in the Availability field apply to internal users based on the organizational unit (OU) to which they belong. The following rules apply by OU:   | Organizational Unit | Rule | | --- | --- | | Cost Center | Cost Center if user is part of the Cost Center | | Custom Group | Custom group if user is part of the Custom Group | | Division | Division user belongs to | | Grade | Grade user belongs to | | Location | Location user belongs to | | Position | Position user belongs to | | Self-Registration Group | Self-Registration group if user is part of the group | | User | User if user is added individually | | System Administration |

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| LAT Draft Review | This email is triggered when a learning assignment draft is created, and the following are true:   * The High User Count threshold is exceeded * The Restrict Submission setting is enabled * The administrator who created the draft does not have permission to submit the draft   This email is triggered an additional time if an administrator edits and saves the same draft if all of the criteria are still true.  Example 1: Administrator A creates a draft assignment with a user count that is above the High User Count threshold, but the Restrict Submission setting is disabled. The email is not triggered.  Example 2: Administrator A attempts to create a learning assignment that exceeds the High User Count threshold, and the Restrict Submission setting is enabled. Administrator A does not have permission to submit draft assignments. Administrator A receives the High User Count restriction and the can only save the assignment as a draft, and this triggers the LAT Draft Review email.  This email can be configured to be sent to Draft Reviewers or specific users. When this email is sent to Draft Reviewers, this includes all administrators who have the Assignment Tool - Submit Draft permission regardless of permission constraints. Administrators may further restrict the recipient list by adding specific users or by restricting with availability. | System Administration |

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| New User Record Created (via Add User Page) | This email can be configured as a notification and is triggered when a new user record is created via the Admin - Users page. This email is not sent to users who are created via a data feed. This email can be sent to the User Created, User Creator, or the User's Manager.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL. | System Administration |

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| Scheduled Report Complete | Scheduled Report is complete | System Administration |

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| Training Deactivation | This email is triggered when a training item is about to be deactivated. This email is only triggered when the course is set to deactivate on a specific date via the Deactivate this course setting in the Course Catalog > General settings. This email is not triggered when the course is deactivated by via the Active checkbox. The email can be sent to Training Contact and Training Owner. This email can be configured as a Reminder type email. This email is active by default and can be found in the System Administration action type section of Email Management.  Use Case: An administrator would like to be reminded that a training item is set to deactivate on December 31st. The Training Deactivation email is configured to trigger one week before the training item deactivates. When the administrator receives the email, the administrator reviews the training item to determine whether or not to reset the deactivation date, allow the course to become inactive, or remove the deactivation settings altogether. | System Administration |

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| Updated Training | Training has been updated to a new version, or pre-work, post-work, or a prerequisite is has been updated or added to the LO.  This is triggered by the user getting automatically updated to a new version of a LO. This email is only triggered by updates to LOs that are versioned, such as an online course, material, test, or curriculum. This email will not trigger for child LOs when they are versioned; in case of child LO versioning, the email will only trigger for the curriculum on the user's transcript.  The TITLE tag enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO.  The MATERIAL.START.DATE tag displays the material's start date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email.  The MATERIAL.END.DATE tag displays the material's end date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email. | System Administration |

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| User Password Change | This email is triggered any time a user changes their password. This email can be sent to User or User's Manager. | System Administration |

Universal Profile Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Badge Provided Notification | This email is triggered when an employee provides a badge for another employee on their Universal Profile - Feedback page. This email is not triggered for the Completed Goal post. This email can be sent as a notification to Feedback Recipient, Feedback Recipient's Manager, or a specific user. | Universal Profile |

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| Feedback Provided Notification | This email is triggered when an employee provides feedback for another employee on their Universal Profile - Feedback page. Feedback can be provided by posting directly to the Feedback page or by commenting on a Feedback post. This email is not triggered when the manager provides feedback to a direct report that is only visible to the user's manager. This email can be sent as a notification to Feedback Recipient or a specific user. | Universal Profile |

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| Feedback Request Notification | This email can be configured as a notification and is triggered when an employee requests feedback from their Feedback page. This email can be sent to a specific user, the Feedback Request Recipient, the Feedback Requester, or the Feedback Requester's Manager. | Universal Profile |

Additional Email Triggers

A full list of all email triggers is also available. See Email Triggers on page 154 for additional information.

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

Email Triggers for Recruiting

This page contains email triggers that may apply to organizations using the Recruiting solution.

Default Password Administration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Default Password Email Reminder Template | This email trigger can be used as a reminder when the default password is nearing expiration. This email is triggered a certain number of days before the default password expires. Administrators can configure when the email is triggered in relation to the default password expiration date. The emails are queued when the default password is set, so it is important to configure this email trigger prior to setting the default password. This email can be configured as a Reminder type email. This email can be sent to a specific administrator user. | Default Password Administration |

Employee Onboarding Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Employee Onboarding Cancelled | This email is triggered when Onboarding is cancelled. The email can be sent to Onboarding User, User's Approver, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management. | Employee Onboarding |

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| Employee Onboarding Started | This email is triggered when Onboarding is started and when emails are configured for the given employee onboarding process. The email can be sent to Onboarding User, User's Approver, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management. | Employee Onboarding |

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| Integration Task Assigned | This email is triggered when a user is assigned an onboarding task. This email can be sent to Assignee or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management.  Use Case: Use this trigger to notify recipients that an integration task has been assigned. | Employee Onboarding |

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| Integration Task Completed | This email is triggered when an integration task is completed. The email can be sent to Onboarding User, User's Approver, User's Future Manager, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Administration.  Use Case: Use this trigger to notify recipients that an integration task has been completed. | Employee Onboarding |

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| Onboarding Form Assigned | This email is triggered when an onboarding form is assigned to a user through an onboarding workflow. The email can be sent to Form Assignee, User's Future Manager, or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management.  Use Case: Use this email to notify or remind a user that they have been assigned an onboarding form as part of an onboarding workflow. | Employee Onboarding |

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| Onboarding Form Completed | This email is triggered when an onboarding form is completed by a user. The email can be sent to Form Assignee, Form Assignee Manager, User's Future Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Management.  Use Case: Use this email to notify a user that they have been assigned an onboarding form as part of an onboarding workflow. | Employee Onboarding |

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| W-4 Forms Pending | This email is triggered when a Forms Pending status is received from CIC Plus. The status is received when there are still pending W-4 forms for a user to complete after they have completed at least one W-4 form on the Paperless Employee website. The email can be sent to Onboarding User, User's Approver, User's Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Employee Onboarding action type section of Email Administration.  Use Case: This trigger notifies users that they have pending W-4 forms to complete. | Employee Onboarding |

Form Management Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Form Approval Completed | This email is triggered when a form request is completed by the approver. The form request is considered Completed if the request is approved, denied, or denied and returned. The email can be sent to Form Responder, Request Recipient, or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default.  This email is triggered by the status of the form request, not the status of the form. For example, if the form approval request is denied and returned, the form status is Returned but the email is triggered because the form approval request is considered Completed.  Note: The form responder is the user who submitted the form.  Use Case: This trigger notifies the form responder (user who submitted the form) and approvers that the form approval request is completed. | Form Management |

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| Form Approval Required | This email is triggered when a form request is assigned to an approver. The email can be sent to Request Recipient or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Form Management action type section of Email Administration.  Use Case: This trigger notifies approvers that they have a pending form approval request to complete. | Form Management |

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| Form Assigned | This email is triggered when a form is assigned to a user. The email can be sent to Form Assignee or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications and reminders to users when forms are assigned. | Form Management |

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| Form Completed | This email is triggered when a form that is associated with a form task is completed. This email is not triggered if the form is not associated with a form task. The email can be sent to Form Assignee, Form Assignee Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications to users when form tasks are completed. | Form Management |

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| Self-Service Form Submitted | This email is triggered when a self-service form is submitted for the given form. The email can be sent to Approver, Form Respondent, Manager, or a specific user. When a form is submitted via proxy, this email is not sent to the proxy user. This email can be configured as a Notification type email. This email is active by default and can be found in the Form Management action type section of Email Management.  Use Case: Use this email to send notifications when self-service forms are submitted. | Form Management |

Other Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Copy Down Scheduled | A copy down completely copies your database from one environment to another. The Copy Down Scheduled email is triggered when a copy down is scheduled in the environment in which the email is enabled. This email must be configured and enabled in each environment in which an organization wants to receive notifications when copy downs are scheduled. For example, if a copy down is scheduled in Pilot from Production, the email is only triggered if the email is configured in Pilot. This email trigger ignores deadbox settings.  The following tags are available for this email trigger:   * DESTINATION.ENVIRONMENT * PORTAL.NAME * RECIPIENT.FIRST.NAME * RECIPIENT.LAST.NAME * REQUESTOR.EMAIL * SCHEDULE.DATETIME * SOURCE.ENVIRONMENT   It is highly recommended that the portal name, source environment, and destination environment email tags are included in the email body to ensure it is clear which portals and environments are being impacted by the copy down. | Other |

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| Login Message Email | This email is triggered when a recipient clicks an Action button that is configured in a login message to send an email to the recipient. The Login Message Email can only be added to login messages, which are configured in Login Message Preferences. | Other |

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| Recurring Billing Processor Event | This email is triggered when a user renews a subscription from the transcript page or when a manager assigns a curriculum extension to a user through inventory. This email can be sent to a specific user or the person in the Purchaser role. The user's manager can be copied on the email. | Other |

Recruiting Emails

Note: The Offer Letter email action type is only available for portals with the Offer Letter Management functionality enabled.

Localization Note: For portals with multiple languages enabled, translated text displays in standard and custom emails, and localizable tags are localized. This allows emails to be received in the recipient's language and also allows email tags to display the translated values, when available. For example, if the job title is localized and included in the email, then the job title displays in the recipient's language. If the recipient's language is not available, then the job title displays in the language of the user who created or edited the job requisition.

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Add Applicant | This email is triggered when an applicant is added to a requisition from [**Manage Candidates**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Manage%20Candidates/Manage%20Candidates%20Page.htm), [**Candidate Search**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Candidate%20Search%20Query/Candidate%20Search%20Query%20Results%20-%20Actions.htm), [**Manage Applicants**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Manage%20Applicants%20-%20Add%20to%20Requisition.htm), or the [**Add Submission page of the Requisition Snapshot**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Add%20Submission.htm). This email can be sent to External Applicant, Internal Applicant, Applicant Reviewer(s), OU Approver, Hiring Manager, Requisition Owner(s). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case  Use this trigger to notify applicants or hiring managers when an applicant is added to a requisition. Applicants can be added to requisitions that they did not apply to from the View Requisition Details page. Applicants require this email as it includes a link to the requisition they were added to so that they can complete the application.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Configuration Note: When creating the Add Applicant email, be sure to include the PASSWORD.RESET.URL tag so that applicants who do not have a profile on the career site will have quick access to the password creation page. When applicants click the link, they are taken to a page for the career site that prompts them to define a password. | Recruiting |

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| Agency Submission Confirmation | This email is triggered when a Recruiting Agency submits an applicant. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner, Requisition Reviewer, Responsible Recruiting Agent, or a specific user.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to owners, reviewers, or recruiting agency users that a Recruiting Agency submitted an applicant to a requisition. | Recruiting |

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| Applicant Review Feedback Received | This email is triggered when feedback for an applicant is submitted from the Resume/CV Review page. The email can be sent to Requisition Owner(s). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment t action type section of Email Management.  Use Case: An applicant reviewer access the Resume/CV Review page to review applicants. She clicks the Advance button , and then she submits her decision. This will trigger the "Applicant Review Feedback Received" email, provided that it is active and configured in Email Management. | Recruiting |

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| Applicant Status Change | This email is triggered when an applicant's status changes. The Applicant Status Change email must be defined for the associated status in order to trigger. When the email is sent, the recipient will receive the email in their language, if available for the portal. Note: The email is defined by the administrator or recruiter when configuring the requisition template or job requisition, respectively.  The email can be sent to Applicant Interviewer(s), Applicant Reviewer(s), External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Frequently Asked Questions  How do I define a status change email for the associated applicant status?  Status change emails can be selected for each applicant status on the Applicant Review tab in requisition templates and the default requisition template, as well as when creating and editing job requisitions. See Status Change Emails. | Recruiting |

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| Application Confirmation | When an applicant submits an application, a notification email can be sent to External Applicant, Hiring Manager, Internal Applicant, or Requisition Owner.  This email also applies to applications submitted via a mobile device. For mobile submissions, the email may be triggered multiple times, depending on the number of times the application is submitted. For example, if the applicant submits a partially completed application from their mobile device, and then completes and submits the application from a desktop device, the Application Confirmation email is sent both times the application is submitted.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send confirmation emails to applicants after they successfully complete an application. | Recruiting |

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| Application Confirmation - As Guest | This email is triggered when a user submits an application as a guest. The email can be sent to External Users, Hiring Manager, or Requisition Owner. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The email can include a PASSWORD.RESET.URL tag so that applicants can define a password on the career site for their profile.  Apply as Guest Applicants and Creating Accounts on Mobile-Friendly Career Sites  The Application Confirmation - As Guest email is important to configure for mobile-friendly career sites. When configured and active, all applicants who apply to jobs on mobile-friendly career sites via the Apply as Guest feature will be sent the Application Confirmation - As Guest email, even if they haven't created an account.  This provides applicants with a path back to the career site so that they can create an account.  Claiming an Account  When an applicant who has applied as a guest returns to the career site for the first time to check the status of their application (take an assessment, schedule an interview, etc.) they have two options:  Option 1: Create an account. Because they applied as a guest, most likely they will create a new account with the same email from their application because they have not done this yet. When they create an account, the system will automatically sync their previous application be to their newly claimed account. Their profile will display any previous applications tied to the email address they used to create their account.  Option 2: Go through the forgot/create password flow. If a user remembers that they applied as a guest but did not create a password, then they can trigger the reset password workflow by clicking the Forgot Password link. This will also allow them to create a new password, and then log in to their portal and see all previous applications. | Recruiting |

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| Assign Applicant Assessment | When an assessment is assigned to an applicant, a notification email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, or Requisition Owner.  Use Case: Use this trigger to send emails to applicants when they are assigned an assessment. The email can include a link to the job application so that the user can easily take the necessary next steps.   * When sent to an external user, the assessment link tag displays as a deep link to the Login/Self Registration page for the career site. After successful login, the user is presented with the assessment immediately. * When sent to an internal user, the assessment link tag displays as a text string: "Navigate to your Transcript to complete this assessment." | Recruiting |

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| Assign Applicant Training | When training is assigned to an applicant, a notification email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, or Requisition Owner.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send emails to applicants when they are assigned training. The email can include a link to the job application so that the user can easily take the necessary next steps.   * When sent to an external user, the training link tag displays as a deep link to the Login/Self Registration page for the career site. After successful login, the user is presented with the training immediately. * When sent to an internal user, the training link tag displays as a text string: "Navigate to your Transcript to complete this training." | Recruiting |

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| Assign Integration Assessment | This email is triggered when an Edge integration assessment is assigned to an applicant, such as a WOTC assessment. This email can be configured as a notification or a reminder, and it can be sent to External Applicant, Internal Applicant, OU Approver, Hiring Manager, OU Approver, or a specific user.  This email only triggers when a successful response is received from the vendor.  Note: The APPLICANT.INTEGRATION.ASSESSMENT.LINK tag must be included in the email. This tag provides a link that the applicant can click to access the assessment.  Note about Auto-Assignment of Pre-Employment Verifications: This email also applies to auto-assignment of pre-employment verifications, via the Automated Candidate Progression (Early Adopter) functionality. For more information, see [**Feature Activation Preferences**](file:///C:/cornerstone-csx-online-help/Content/Preferences/Recruiting%20Preferences/Feature%20Activation%20Preferences.htm). | Recruiting |

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| Background Check Assigned | This email is triggered when a background check is assigned to an applicant. This assignment is dictated by successful assignment in the vendor integration and not solely by clicking the Assign link for a background check. This email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to applicants when they are assigned a background check to complete. | Recruiting |

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| Background Check Complete | This email is triggered when a background check is completed. This assignment is dictated by successful completion of the background check in the vendor integration. This email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to recruiters when a background check is complete. | Recruiting |

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| Candidate Hired | This email is triggered when a candidate's applicant status is changed to Hired. The email can be sent to Requisition Owner, Hiring Manager, Next Level Hiring Manager, or a specific user.  Use Case: Use this trigger to notify recipients that a candidate's applicant status has been changed to Hired. This status change indicates that a hiring decision has been made.  Note: Offer letter related tags are only populated in the email if the offer letter has been accepted. | Recruiting |

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| Candidate Offer Response Received | This email is triggered when a candidate response is recorded for a candidate. The email can be sent to Requisition Owner, Hiring Manager, Next Level Hiring Manager, or a specific user.  Use Case: Use this trigger to notify recipients that a candidate response has been recorded for a candidate. This email can also be triggered when a user manually records a response for the candidate from the Offer Letter Management table or when the candidate responds to an offer letter from their My Profile page. | Recruiting |

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| Connect With Us New User | This email is triggered when a user submits their information via Connect With Us. The email can be sent to External Users. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment t action type section of Email Management. | Recruiting |

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| Disposition | When an applicant is passed on, a notification or reminder email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner, or Requisition Reviewer.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to applicants when they are passed on for consideration. The trigger can be configured as a reminder to delay response back to the applicant as necessary. | Recruiting |

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| Email Applicant | When a user manually emails an applicant, a notification can be sent to External Applicant or Internal Applicant. This email can be triggered from the Manage Applicants or Application Profile page.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  The EMAIL.CUSTOM.MESSAGE tag can be included as a placeholder in the email. The tag will be replaced by the text in the Custom Message field when emailing applicants via the Send Email from Template action on [**Manage Applicants**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Manage%20Applicants%20-%20Send%20Email.htm) or the [**Application Profile page**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Applicant%20Profile%20Page%20-%20Summary%20Tab.htm).  Note: When including the EMAIL.CUSTOM.MESSAGE tag, a carriage return is automatically included at the end of the message that replaces the tag. If you do not want an extra line between the end of the custom message and the rest of the email, place the EMAIL.CUSTOM.MESSAGE tag directly next to the text that follows the custom message.  Note: If you do not include the EMAIL.CUSTOM.MESSAGE tag, the ability to add a custom message is not available when sending a template email from the Applicant Profile page.  Use Case: Use this trigger when sending ad hoc emails to applicants. Ad hoc emails can be sent from the Manage Applicants or Applicant Profile pages. Emails can be sent to one applicant or a batch of applicants. | Recruiting |

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| Email Offer to Candidate | This email is triggered when an offer is emailed to a candidate. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Next Level Hiring Manager, or a specific user.  Use Case: Use this trigger to send an offer letter to a candidate. This trigger can also be used to notify other users that an offer letter has been sent to the candidate. Note: If the offer letter is attached to the email as a PDF, any other attachments added during the [**Send to Candidate**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Offer%20Letter%20Workflow%20-%20Send%20to%20Candidate.htm) workflow step are also added to the email as attachments. | Recruiting |

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| Integration Assessment Assignment Status | This email is triggered to notify recruiters and hiring managers when an error is received from the vendor during assignment of an integration assessment. This allows recruiters to learn about the error quickly so they can manually re-assign the integration assessment on the Manage Candidates page or automatically by re-adding a candidate to the Assessment Status. The new email is sent if there is an error with a manual or auto-assignment of the integration.  Note: The APPLICANT.INTEGRATION.NAME tag must be included in the email. | Recruiting |

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| Integration Assessment Completed | This email is triggered when an applicant has successfully completed their custom integration task via their My Profile page in the career site or the assessment via the email link. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, and Requisition Owner. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management. | Recruiting |

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| Interview Cancelled Notification | This email is triggered when an interviewer is removed from an interview session or when an interview session is cancelled. The email can be sent to Applicant Interviewer(s) or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  This email is used when sending Outlook Meeting Invite cancellations. The email contains an ICS attachment if an ICS attachment has already been created for the interviewer or for the session being cancelled.  Use Case: When an interviewer needs to be removed from an interview session or if an interview session needs to be cancelled, this email trigger is sent in order to notify the interviewer of the cancellation.  Best Practice: It is a best practice to include the COMMENTS.TO.INTERVIEWER tag in the email. This tag will show recipients any comments that the interview scheduler included when cancelling the interview. If this tag is not present in the email, and the interview scheduler entered a comment when cancelling the interview, then the comments will not appear in the email to recipients.  Interview Manager Note: The [**Interview Manager page**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Interview%20Manager/Interview%20Manager%20Overview.htm) is automatically enabled for interviewers. If the interviewer is removed from an interview, the Interview Manager page is no longer visible. Any comments regarding the interview are no longer accessible to the interviewer. | Recruiting |

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| Interview Recommendation Nudge | This email is triggered when a user selects the Nudge Interviewer link from the Options column on the Interview Manager page. The email can be sent to Requisition Owner(s), Applicant Interviewer(s), Hiring Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Recruiters may want to nudge interviewers when they have not completed their recommendation for an interview. Use this email trigger to notify interviewers that they need to complete their interview recommendation. | Recruiting |

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| Interview Recommendation Pending | This email is triggered when an interview recommendation is pending a response from an interviewer. The email can be sent to Requisition Owner(s), Applicant Interviewer(s), Hiring Manager, or a specific user. This email can be configured as a Notification or Reminder type email. For Reminder type emails, the reminder is triggered a set number of days, hours, or minutes after the initial interview request is sent. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Use this trigger to send notifications to interviewers when an interview is pending their recommendation. Administrators may want to configure this trigger to fire automatically as a notification or reminder to interviewers to complete their interview recommendations. | Recruiting |

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| Interview Recommendation Recorded | This email is triggered when an interview recommendation is recorded by the interviewer. The email can be sent to Requisition Owner(s), Applicant Interviewer(s), Hiring Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management. Note: This email fires when recommendations are recorded either in Cornerstone or HireVue for video interviews.  Use Case: Recruiters and Hiring Managers may want to see when an interview recommendation is recorded for an interview. Use this email trigger to send updates whenever a recommendation in recorded for an interview. | Recruiting |

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| Interview Scheduling Notification - Applicant | This email is triggered when an applicant scheduling notification is sent to the applicant, and is also triggered when an applicant self scheduled an interview for an interview event. The email can be sent to External Applicant, Internal Applicant, or a specific user. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: When a recruiter schedules an interview, they may want to send a notification to the applicant about the scheduled date, time, and interview type. Use this trigger to notify the applicant that an interview session is scheduled. | Recruiting |

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| Interview Scheduling Notification - Interviewer(s) | This email is triggered when an interview scheduling notification is sent to interviewers. The email can be sent to Applicant Interviewer(s) or a specific user. This email can be configured as a Notification or Reminder type email. For Reminder type emails, the reminder is triggered a set number of days, hours, or minutes before the interview start time. This email is active by default and can be found in the Recruitment action type section of Email Management.  This email is used when sending Outlook Meeting Invite requests. The email contains an ICS attachment if Outlook notifications are enabled by the administrator in Interview Management Preferences.  This email is used when using Outlook Scheduler to preview the email, if the Outlook scheduling option is enabled by the administrator in Interview Management Preferences.  Use Case: When a recruiter schedules an interview, they may want to notify the interviewers about the scheduled date, time, and interview type. Use this trigger to notify the interviewers that an interview session is scheduled. | Recruiting |

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| Interview Scheduling Response | This email is triggered when a scheduling response is recorded from Outlook. The email can be sent to Requisition Owner(s), Applicant Interviewer(s), Hiring Manager, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  This email is used when Outlook Meeting Invite requests are accepted or denied. The email only fires when the recipient responds with either Accept, Tentative, or Decline. If the recipient responds with Tentative, then the response is treated as a decline. Note: The option to accept or decline a meeting invite is a standard feature in Outlook. This email fires when the recipient clicks either the Accept or Decline button in the invite.  Use Case: Owners and hiring managers may want to be updated when an interview request response is recorded in Outlook. Use this email trigger to send notifications to recruiters when a response is recorded in Outlook. | Recruiting |

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| Invitation to Apply | This email is triggered when an invitation to apply is sent. The email can be sent to Requisition Owner, Requisition Reviewer, Hiring Manager, Invitation Recipient, or a specific user.  Use Case: Use this trigger to send invitations to apply to applicants who have not completed an application or who were found during an applicant search.  Note: The APPLICANT.STATUS, APPLICANT.STATUS.CHANGE.DATE, APPLICATION.DATE, and APPLICATION.REVIEW.LINK tags are not available for this email trigger. | Recruiting |

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| Invitation to Interview Event (Applicant Self Schedule) | This email is triggered when a recruiter sends a self schedule invitation to an applicant for an interview event. The email can be sent to Applicant, Hiring Manager, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Use this email to send a message to the applicant regarding self scheduling an interview event. With this link, the applicant can schedule themselves into an interview event. | Recruiting |

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| Job Alert | This email is triggered when a requisition is posted that meets an internal or external applicant’s job alert criteria. This email can be sent to Alert Recipient (Internal) or Alert Recipient (External). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  For external recipients who elect to receive daily job alerts, the job alerts are sent at 1:00am PST each day but only if there is at least one open requisition that meets the criteria the applicant defined for the job alert. Note: If a requisition opens and closes in the same day, the closed requisition is not included in the daily job alert.  For external recipients who elect to receive weekly job alerts, the job alerts are sent each week at 1:00am PST beginning one week from the date on which the job alert is created. However, the email is only triggered if there is at least one open requisition that meets the criteria the applicant defined for the job alert.  Use Case: Use this trigger to send job alerts to internal and/or external applicants, informing them of open requisitions that match their job interests. For external recipients, the email is triggered on either a daily or weekly basis, depending on how the external applicant configures the job alert on the career site. For internal recipients, the email is triggered immediately when a job, for which the user has expressed an interest, is posted to Career Center, provided the user meets the availability criteria for the requisition. | Recruiting |

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| Merged Duplicate Applicants | This email is triggered when a duplicate applicant is merged under a target profile. The email can be sent to Hiring Manager, Merged Applicant, Requisition Owner(s), Target Applicant (this is defined as the applicant with whom the merged applicant is merged), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruiting action type section of Email Management.  Use Case: Use this trigger to send notifications that duplicate applicant profiles have been merged and that all merged applications are compiled under the target profile. | Recruiting |

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| New Applicant Comment Posted | When a user posts a new comment for an applicant, a notification email can be sent to Requisition Owner, Hiring Manager, OU Approver, or Applicant Reviewers.  Use Case: Use this trigger to send notifications to users who are interested in receiving emails when new comments are posted for applicants. Reviewers may want to see what other reviewers are commenting about an applicant. | Recruiting |

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| New Profile Creation | When a user creates a new applicant profile, a notification email can be sent to User. This trigger is used to inform applicants that they created a new profile. Note: This trigger only works for profiles created from the Create Profile page and does not trigger emails when applicants use LinkedIn or other 3rd party profile generation tools.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Use Case: Use this trigger to send emails to applicants to confirm that they created a new applicant profile. This trigger could be used to drive applicants back to a Career Site after they create a profile. | Recruiting |

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| Offer Approval Decision | This email is triggered when an approver records an approval decision for an offer. The email can be sent to Requisition Owner, Hiring Manager, Next Level Hiring Manager, or a specific user.Use Case: Use this trigger to notify recipients that an offer letter approval decision has been made by an approver. | Recruiting |

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| Offer Pending Approval | This email is triggered when an offer requires approval. The email can be sent to Next Approver, Requisition Owner, Hiring Manager, Next Level Hiring Manager, or a specific user.  Reminder emails are triggered when an offer that requires approval has not been responded to by the approver. The email continues to fire based on the interval configured for the reminder.  Use Case: Use this trigger to notify recipients of an offer that requires their approval. It is possible (and likely) to send multiple emails using this trigger at multiple times.   * If the approval workflow utilizes sequential approval by multiple recipients, then the email is sent to the next approver only after the previous recipient approves the offer. * If the approval workflow utilizes concurrent approval by multiple recipients, then the email is sent to all recipients within a tier simultaneously.   Use Case: Use this trigger to remind recipients of an offer that requires their approval. It is possible (and likely) to send multiple emails using this trigger at multiple times.  Note: If the recipient is "Next approver(s) if offer is pending" and there is at least one approver who is configured on the offer letter as "Approver," then the Offer Pending Approval email is only sent to the "Next approver(s) if offer is pending" recipient. This means that users who are defined as "Notification-Only Approver" on the offer letter will not also receive this email. | Recruiting |

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| Onboarding Notifications | This email is triggered when the Send button is clicked in the Send Onboarding Notifications pop-up from the Applicant Profile page. This email can be sent to External Applicant, Hiring Manager, Internal Applicant, Next Level Hiring Manager, Requisition Owner(s), Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to notify the applicable personnel of a new hire's start date to ensure that the necessary provisions will be provided in preparation for beginning employment.  Use Case: When a hiring manager brings on a new person in a Sales position, the recruiter needs to work with a number of different groups within the organization to prepare for the new employee’s first day. At the very least, this involves six departments and personnel, including the following:   * The Technology team needs to provision a new computer and telephone. * The Facilities team needs to ensure building access and parking for the new employee, as well as a clean workspace. * Human Resources needs to distribute new hire materials and gather personnel information. * Finance needs to set up accounts for the new employee. * The Training team needs to register the employee for trainings. * The new hire’s manager should be notified of the start date and should be prompted to prepare for the new employee’s arrival.   By configuring emails to be sent to each of these departments and personnel, the hiring manager can ensure that all pertinent parties are notified of their responsibilities well in advance of the employee's start date.  Best Practice: It is a best practice to provide a clear title for each email template. Typically, this email is only sent by recruiters who do not have access to Email Management from which to view the email content. Recruiters select one or more of the email templates from the Applicant Profile page, but they are not able to preview the email before sending it. Providing a clear title for each email helps recruiters know which template(s) are appropriate to select when sending onboarding notifications. Without a clear title, recruiters may send the wrong emails and fail to notify the appropriate personnel about upcoming new hires. | Recruiting |

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| OnDemand Video Interview Assigned | This email is triggered when an On Demand Video Interview is assigned to an applicant. The email can be sent to Applicant Interviewer(s), External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to applicants when they have been assigned an On Demand Video interview. This email may include a link for the user to complete their video interview, if the appropriate tag for the link is included in the body of the email. | Recruiting |

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| OnDemand Video Interview Completed | This email is triggered when an applicant completes an On Demand Video interview. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner(s), Applicant Interviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to requisition owners and interviewers when an applicant completes an On Demand Video interview. Interviewers may want to use this email trigger as a notification to let requisition owners and interviewers know when to review an applicant’s submitted video interview. | Recruiting |

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| Referral to External User | This email is triggered when a user refers a requisition in the [**internal career site**](file:///C:/cornerstone-csx-online-help/Content/User/Recruiting/Internal%20Career%20Site/Internal%20Career%20Site%20Refer%20Candidates.htm) or [**Career Center (Legacy)**](file:///C:/cornerstone-csx-online-help/Content/User/Succession/Career%20Center%20-%20Refer%20Jobs.htm). The email can be sent to Hiring Manager, Referral Recipient, Requisition Owner(s), Requisition Reviewer(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section in Email Management.  Note: A custom message can be added by the sender. In order for a custom message to appear to the recipient, the EMAIL.CUSTOM.MESSAGE email tag must be included when [**configuring the email in Email Administration**](#_Ref-1964427258). | Recruiting |

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| Referral to Internal User | This email is triggered when an employee refers a requisition via email to another employee. The email can be sent to User, Referral, or a specific user. | Recruiting |

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| Reminder to Apply | This email is triggered when an applicant expresses interest in a job by creating a job alert. The email reminds applicants to apply for the job after creating a job alert for the requisition. The email displays to the applicant in the applicant's browser language.  The content of the email is as follows:   | Email Field | Content | | --- | --- | | Subject | Reminder to Apply - [Position Name] | | From Address | [System default email address that displays in the From field for emails in Email Management] | | Message | Thank you for your interest in the <b>[Display Job Title]</b> position at <b>[Organization Name]</b>. In order to be considered for this position, please submit an application by clicking on the link below.  [Position Name] Apply Now <br/>  Thank you.  [HTML version of External Job Details page]  Note: The link to apply to the requisition is unique to the applicant and the source from which the applicant arrived at the career site. Clicking the [Position Name] Apply Now link opens the Job Details page on the same career site for the requisition from which the applicant created the job alert. |   Use Case: An administrator activates the Reminder to Apply email in Email Management to ensure that applicants are reminded to apply to job requisitions for which they express interest. | Recruiting |

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| Requisition Approval Final Status | This email fires when a final approval or denial decision is reached for a requisition that is pending approval. The email is used to send notifications about the final status of a requisition to the requisition owner, reviewer, and other users. The email can be sent to a specific user or the role of Requisition Owner, Hiring Manager, or OU Approver.  Use Case: A hiring manager would like to be informed when a requisition for which they are an approver is approved or denied. The administrator configures the Requisition Approval Final Status email to be sent to the hiring manager when the requisition has a final approval or denial status. | Recruiting |

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| Requisition Closed/Cancelled | This email is triggered when a requisition is closed or cancelled. The email can be sent to Requisition Owner, Requisition Reviewer, Hiring Manager, Recruiting Agencies, Active Applicants, or a specific user. Note: Sending to Recruiting Agencies includes the email address that is associated with the default user defined for the agency by the administrator.  The Availability setting for this email can be configured so that the emails trigger for external candidates.  Use Case: Use this trigger to send notifications to owners, reviewers, or recruiting agency users that a requisition has been closed or cancelled. | Recruiting |

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| Requisition Pending Approval | When a requisition requires approval, a notification or reminder email can be sent to Next approver if requisition is pending, Requisition Owner, or Hiring Manager.  When configured as a reminder email, the emails are triggered when the approver has not yet submitted an approval decision for a requisition by the time the reminder time has elapsed. The email continues to fire based on the interval configured for the reminder.  Use Case: Use this trigger to notify recipients of a requisition that requires their approval. It is possible to send multiple emails using this trigger at multiple times.   * If the approval workflow utilizes sequential approval by multiple recipients, send email to next approver only after previous recipient approves the requisition. * If the approval workflow utilizes concurrent approval by multiple recipients, send email to all recipients within a tier simultaneously.   Use Case: Use this trigger to remind approvers repeatedly that they have one or more requisitions pending approval. The reminder helps to ensure that requisitions are approved in a timely manner. | Recruiting |

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| Requisition Posted to Agency | This email notifies recruiting agencies that a new requisition has been posted. This email can be sent to Recruiting Agencies, Hiring Manager, Requisition Owner(s), and Requisition Reviewer(s). This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment t action type section of Email Management.  Note: This email will fire each time the Post button is clicked in the Recruiting Agencies section of the [**Edit Postings page**](file:///C:/cornerstone-csx-online-help/Content/Manager/Recruiting/Job%20Posting%20Page.htm), even if there are no changes to the postings for the agencies that are listed. For example, a requisition is posted to Agency A. The next day, the same requisition is posted to Agency B. Agency A will receive the Requisition Posted to Agency email both times the requisition is posted. | Recruiting |

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| Requisition Posted | This email is triggered any time a requisition moves to the Open status, regardless of whether or not the requisition is being posted at that time to any career sites, job boards, etc. The email can be sent to Requisition Owner, Requisition Reviewer, Hiring Manager, or a specific user.  Open Status Note: If there is no approval workflow, a requisition moves into an Open status immediately upon submission. If there is an approval workflow, the requisition moves into an Open status when the approval workflow is completed.  Use Case: Use this trigger to send notifications to owners, reviewers, or recruiting agency users that a requisition has been posted. This trigger will also send notifications when a requisition is edited and re-opened. | Recruiting |

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| Requisition Request Response | This email is triggered when a requisition request is accepted or declined. The email can be sent to Request Reviewer(s), Requester, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Hiring managers would like to be notified when a reviewer responds to their requisition request. This email is used by hiring managers to view the response to their requests. | Recruiting |

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| Requisition Request Submitted | This email is triggered when a requisition request is successfully submitted. The email can be sent to Request Reviewer(s), Requestor, or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Requisition reviewers would like to be notified when a hiring manager submits a requisition request. This email is used by reviewers to know when they have a request to review. | Recruiting |

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| Review Applicant | This email is triggered when an applicant is moved into a Review status type. The email is also triggered when a new reviewer has been added, and the applicant is already in a Review status type.  This is a Notification type email and can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner, or Requisition Reviewer.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  When configuring this email, you can include the REVIEW.APPLICANT.RESUME.LINK tag. This tag displays the applicant's full name as a link that opens the Resume/CV Review page.  Use Case: Use this email to send notifications to reviewers and hiring managers when an applicant is ready to be reviewed. | Recruiting |

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| Review Applicant Daily Summary | This email provides applicant reviewers with a daily summary of applicants who have been moved to the first instance of the status type of Review, whether for open or closed requisitions. In addition, a new email tag is added.  This email is triggered once a day at 5:00pm GMT. This email only fires if there is at least one applicant who has been moved into the first instance of the Review status type for a requisition during the past day.  This email can be sent to Applicant Reviewer and cannot be carbon copied. This email can only be configured as a notification type email and is active by default.  Note: This email is only available to users with permission to review requisitions.  Use Case: An executive is an Applicant Reviewer for several open requisitions within a corporation. The executive currently receives one email for each applicant who is moved to the first instance of a Review status type for each requisition for which the executive is an applicant reviewer. This results in a large quantity of emails. Instead, the executive would like to receive one email daily that lists all applicants who have been moved into the first instance of the status type of Review for all of the requisitions for which the executive is listed as a reviewer.    Implementation Note: A status type of Review must be active in Applicant Statuses in order for the Review Applicant Daily Summary email to trigger. The email must also be configured and active in Email Management.  Email Tag SSO Note: The REVIEW.APPLICANT.RESUME.SUMMARY email tag is SSO enabled. Hiring managers can click the link and access applicants without having to log in to the portal. For organizations that do not use SSO, hiring managers will be directed to the custom login page. | Recruiting |

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| Send Offer to Candidate Profile | This email is triggered when an offer is sent to a user's candidate profile. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Next Level Hiring Manager, or a specific user.Use Case: Use this trigger to notify a candidate that they have an offer letter pending approval in their candidate profile. This trigger can also be used to notify other users that an offer letter has been sent to the candidate. | Recruiting |

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| SHL Assessment Assigned | This email is triggered when an SHL assessment is assigned to an applicant. One email is sent per assessment, even if there are multiple assessments in the same application workflow. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner(s), or a specific user. This email can also be sent to a specific job role, which includes Hiring Manager, OU Approver, and Requisition Owners(s). This email can be configured as a Notification or Reminder type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: An applicant begins an application and requests an assessment. The applicant does not finish the assessment. At a later date, the applicant needs a way to return to assessment. The applicant can access the Assessment Assigned email that includes a link to their applicant profile for the specific position. | Recruiting |

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| SHL Assessment Complete | This email is triggered when an SHL assessment is completed by an applicant within the vendor integration site. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, OU Approver, Requisition Owner(s), or a specific user. This email can be configured as a Notification type email. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Hiring managers would like to be notified when an applicant has completed an assessment so that they can view the assessment results on the Manage Applicants page.  Note: Once the applicant submits the application, if the assessment completion email is configured for the portal, then the email is triggered for each completed assessment in the application. A single completion email is not sent for all of the assessments in an application. | Recruiting |

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| Submission Accepted as Applicant | This email is triggered when a submission is accepted as a qualified applicant, which is also known as the point at which the submission receives a candidate date in the database. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner, Requisition Reviewer, Responsible Recruiting Agent, or a specific user.  The Availability setting for this email can be configured so that the email triggers for external candidates. The system checks the indirect OU designations for external candidates and sends the appropriate emails for which they meet the availability criteria.  Use Case: Use this trigger to send notifications to owners, reviewers, or recruiting agency users that a submission was accepted into the Applicant pool for a requisition. The accepting of a submission indicates that the submission is a qualified applicant and may trigger cost updates for the Recruiting Agency. | Recruiting |

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| Today’s Scheduled Interviews | This email is triggered at the beginning of each day and provides a list of the interviews that are scheduled for the day on which the email is triggered. The email can be sent to Applicant Interviewer(s). This email can be configured as a Notification type email. This email is sent at 5 a.m. each day if the email is active, but the email is only sent to interviewers who have one or more interviews scheduled for the day on which the email is sent. This email is active by default and can be found in the Recruitment action type section of Email Management.  Use Case: Use this trigger to send notifications to owners and interviewers when they have interviews scheduled. Interviewers and recruiters may want to a full day summary of all interviews that they have scheduled for the current date. | Recruiting |

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| Voluntary Withdrawal | This email is triggered when an applicant voluntarily withdraws their submitted application. The email can be sent to External Applicant, Hiring Manager, Internal Applicant, Requisition Owner, Requisition Reviewer, Responsible Recruiting Agent, or a specific user.Use Case: Use this trigger to send notifications to owners and reviewers when an applicant chooses to withdraw from an application. Administrators may also want to send a confirmation email to the applicant after they have withdrawn their application.  Note: See the Overview topic in the Agency Portal section of Online Help for more information about the Responsible Recruiting Agent role. See Agency Portal Overview. | Recruiting |

System Administration Emails

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Admin Password Change | This email is triggered when an administrator manually resets a user's password. The user's new password cannot be included in the email. Because of this, the administrator must communicate this password outside of the system. This email can be sent to User or User's Manager. | System Administration |

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| Effective Dating Error | This email is triggered when a user record change that was set with a future effective date attempts to process and an error is generated. The email can be sent as a notification to User, User's Manager, User's Approver, or a specific user.  The EFFECTIVE.DATING.ERROR.DESCRIPTION tag can be included in the email message to include the description of the effective dating error. If there are multiple errors, then each error description is displayed on its own line in the message. | System Administration |

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| Forget Password | If the Password Reset Option in Password Preferences is set to Reset By Email Notification, then the Forget Password email is triggered when a user clicks Forgot Password? on the Login page. This email can be sent to External User or Internal User. If the user clicks Forgot Password? multiple times and a password reset URL is included in the email, then a new URL is generated for each email and the previous URL is no longer valid.  This email must be configured for administrators to select the "Send Password Reset Email to user's email address" option when resetting a user's password on the Admin - Users page.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL.  Defining Availability  The availability settings do not apply to external users when External User is added as a recipient in the Send To field.  When Internal User is added to the Send To field, the availability settings defined in the Availability field apply to internal users based on the organizational unit (OU) to which they belong. The following rules apply by OU:   | Organizational Unit | Rule | | --- | --- | | Cost Center | Cost Center if user is part of the Cost Center | | Custom Group | Custom group if user is part of the Custom Group | | Division | Division user belongs to | | Grade | Grade user belongs to | | Location | Location user belongs to | | Position | Position user belongs to | | Self-Registration Group | Self-Registration group if user is part of the group | | User | User if user is added individually | | System Administration |

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| LAT Draft Review | This email is triggered when a learning assignment draft is created, and the following are true:   * The High User Count threshold is exceeded * The Restrict Submission setting is enabled * The administrator who created the draft does not have permission to submit the draft   This email is triggered an additional time if an administrator edits and saves the same draft if all of the criteria are still true.  Example 1: Administrator A creates a draft assignment with a user count that is above the High User Count threshold, but the Restrict Submission setting is disabled. The email is not triggered.  Example 2: Administrator A attempts to create a learning assignment that exceeds the High User Count threshold, and the Restrict Submission setting is enabled. Administrator A does not have permission to submit draft assignments. Administrator A receives the High User Count restriction and the can only save the assignment as a draft, and this triggers the LAT Draft Review email.  This email can be configured to be sent to Draft Reviewers or specific users. When this email is sent to Draft Reviewers, this includes all administrators who have the Assignment Tool - Submit Draft permission regardless of permission constraints. Administrators may further restrict the recipient list by adding specific users or by restricting with availability. | System Administration |

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| New User Record Created (via Add User Page) | This email can be configured as a notification and is triggered when a new user record is created via the Admin - Users page. This email is not sent to users who are created via a data feed. This email can be sent to the User Created, User Creator, or the User's Manager.  The PASSWORD.RESET.URL email tag is a link that opens a page on which the user can create a password. If this email is sent multiple times to the same recipient, then this URL is regenerated each time and the previous URL is no longer valid. Also, the password reset URL is only valid for 48 hours. If the user does not reset their password within the 48-hour validity period, then the user must click Forgot Password? again to get a new password reset URL. | System Administration |

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| Scheduled Report Complete | Scheduled Report is complete | System Administration |

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| Training Deactivation | This email is triggered when a training item is about to be deactivated. This email is only triggered when the course is set to deactivate on a specific date via the Deactivate this course setting in the Course Catalog > General settings. This email is not triggered when the course is deactivated by via the Active checkbox. The email can be sent to Training Contact and Training Owner. This email can be configured as a Reminder type email. This email is active by default and can be found in the System Administration action type section of Email Management.  Use Case: An administrator would like to be reminded that a training item is set to deactivate on December 31st. The Training Deactivation email is configured to trigger one week before the training item deactivates. When the administrator receives the email, the administrator reviews the training item to determine whether or not to reset the deactivation date, allow the course to become inactive, or remove the deactivation settings altogether. | System Administration |

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| Updated Training | Training has been updated to a new version, or pre-work, post-work, or a prerequisite is has been updated or added to the LO.  This is triggered by the user getting automatically updated to a new version of a LO. This email is only triggered by updates to LOs that are versioned, such as an online course, material, test, or curriculum. This email will not trigger for child LOs when they are versioned; in case of child LO versioning, the email will only trigger for the curriculum on the user's transcript.  The TITLE tag enables email recipients to know which learning object (LO) is updated. This tag displays the name of the LO.  The MATERIAL.START.DATE tag displays the material's start date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email.  The MATERIAL.END.DATE tag displays the material's end date. If the material has multiple versions, then this tag is specific to the material version. If this field is not defined for the training, then this tag is not included in the email. | System Administration |

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| User Password Change | This email is triggered any time a user changes their password. This email can be sent to User or User's Manager. | System Administration |

Universal Profile Emails

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| --- | --- | --- |
| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Badge Provided Notification | This email is triggered when an employee provides a badge for another employee on their Universal Profile - Feedback page. This email is not triggered for the Completed Goal post. This email can be sent as a notification to Feedback Recipient, Feedback Recipient's Manager, or a specific user. | Universal Profile |

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| Feedback Provided Notification | This email is triggered when an employee provides feedback for another employee on their Universal Profile - Feedback page. Feedback can be provided by posting directly to the Feedback page or by commenting on a Feedback post. This email is not triggered when the manager provides feedback to a direct report that is only visible to the user's manager. This email can be sent as a notification to Feedback Recipient or a specific user. | Universal Profile |

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| Feedback Request Notification | This email can be configured as a notification and is triggered when an employee requests feedback from their Feedback page. This email can be sent to a specific user, the Feedback Request Recipient, the Feedback Requester, or the Feedback Requester's Manager. | Universal Profile |

Additional Email Triggers

A full list of all email triggers is also available. See Email Triggers on page 154 for additional information.

Troubleshooting Information

The following pages contain troubleshooting guides for using emails:

* See Troubleshooting Guide - Emails.
* See Email Troubleshooting Guide.

Email Calendar Options

Calendar options are available in Email Administration and for custom emails for sessions.

Calendar options provide seamless integration with a user's Outlook or Google calendar. Administrators can configure calendar meeting emails not only to add sessions to a user's calendar but also manage updates to the session. This functionality is available from any device used to manage one's Outlook or Google calendar, such as a PC, laptop, mobile phone, or tablet computer.



1. Calendar Options

The following options are available in the Calendar Options field:

* Meeting invite - This option sends the email as a meeting invite with the standard meeting options. For sessions containing several parts, one meeting invitation is sent for each part. For Google Calendar meeting invites, the event is automatically added to the user's calendar and set to busy even if no response is provided. The meeting responses do not affect the user's registration status in the system. The event name displays in the meeting invite title and the description displays the body of the email trigger. The meeting organizer is the email address entered in the From address field when configuring the email via Email Administration. The maximum number of 8,192 characters can display in the event description. Any additional characters are removed. Any users in the CC field also receive a meeting invite. The email recipient can respond to the invitation as follows:
  + Yes - Selecting this option keeps the event on the user's calendar with a Yes status.
  + Maybe - Selecting this option keeps the event on the user's calendar with a Maybe status.
  + No - Selecting this response removes the event from the user's calendar. This does not affect the user's registration status.
* Calendar attachment - Selecting this option sends the email with a calendar attachment. For sessions containing several parts, one email is sent containing an attachment for each part. The meeting organizer mentioned in the attachment is "No reply." When the attachment is opened and saved, the session is automatically added to the user's calendar.
* None - This option is selected by default. Selecting this option sends the email without calendar features.
* Reminder (Outlook only) - The reminder functionality only applies to Outlook meetings.

2. Multi-part Sessions

If the email is configured as meeting invite for multi-part sessions, each session part triggers an individual email.

If the email is configured with calendar attachment, a single email is sent containing one attachment for each part.

3. Emails Triggered When Editing a Session Part

Refer to the Session Changed email trigger table in Section 5 - Email Triggers to learn more about emails triggered when editing a session part.

4. Email Format

On the Create New Email page for emails that support calendar options, Email Format options are available. The administrator can choose between the following two radio button options:

* Outlook - Select this option to ensure the email meeting invitation will be formatted correctly for Outlook.
* Other - Select this option to ensure the email meeting invitation will be formatted correctly for other email providers, such as Gmail, Yahoo, and others. This option is selected by default.

5. Emails Triggers

The Calendar Options and Email Format options are only available for the following email triggers:

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| EMAIL NAME | EMAIL DESCRIPTION | ACTION TYPE |

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| Approve ILT Session | Approval settings can be set within the Event/Session or within the user details page. If approval is required, the requested training will remain in pending approval status until the approver approves, defers, or denies the request. This email is fired when an Approver approves a request for an ILT session. This email can be used to notify the student that the request has been approved or to notify a particular approver in the approval workflow (e.g., Cost center approver or User's manager). | Instructor Led Training |

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| Cancel Registration (with withdrawal penalty) | In the Event/Session Details step, there is a Penalty for Withdrawal column. There is an Add Withdrawal Penalty link that opens up text boxes to apply a percentage or dollar amount, and the amount of days prior to the Session date when the user cancels, where these would be applied. Once a user withdraws from a Session, the selected recipients will receive this email, and the withdrawal penalty is applied. | Instructor Led Training |

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| Cancel Registration (without withdrawal penalty) | In the Event/Session Details step, there is a Penalty for Withdrawal column. If the Add Withdrawal Penalty is not selected, and the user withdraws from a Session, the selected recipients will receive this email stating that no withdrawal penalty has been applied. | Instructor Led Training |

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| Cancel Session | ILT Session is cancelled. This email will only fire for current/upcoming sessions and will not fire if the session dates were in the past when the session was cancelled.  The REASON.CANCEL.SESSION tag is available for the Cancel Session email so that the reason entered by the administrators when the session was cancelled can be included in the email. This tag will display the reason selected in the drop-down by the administrator who cancelled the session. | ILT Administration |

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| Grant Waitlist Request | Once a user has submitted a Waitlist Request, they will remain in Waitlisted status until an administrator makes the decision to grant or deny the request. If the ILT administrator grants a user's request to attend a session, this email will be triggered.  When a user withdraws from a session and a seat becomes available, users on the waitlist are removed from the waitlist, they are granted the option to register for the open seat, and this email is triggered, if enabled. The waitlisted users will see the session on their transcripts in "Registration Pending" status.   * As soon as one of the user registers, all other users are moved back to the waiting list. In this scenario, if another user withdraws, the process is completed again for the users remaining on the waitlist. * If none of the users register, the previously waitlisted users are not moved back to the waiting list. In this scenario, if another user withdraws, since no users are on the waiting list in that moment, this email is not triggered.   When a user withdraws from a session after the registration deadline, this email is not triggered. | Instructor Led Training |

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| ILT Session becomes Available | Session is approved and available for enrollment. If this email is created with a Send To of "Interested users," it will trigger an email to users on the Interest Tracking list if the users are included in the session availability criteria for the session when that session is created. | ILT Administration |

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| ILT Session Register | Once a user registers for an ILT session, this email can be sent to the student, approvers, assignors, instructors, and anyone else who would need information about the registered session. This email will not be triggered after the session start date, regardless of the session end date.  This email does not include Accept or Deny options when it is sent as a calendar invitation because this email does not interact with the Cornerstone system. It is designed to only allow recipients to save the session to their calendar. | Instructor Led Training |

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| Session Changed | The Session Changed email is triggered if the following session fields were changed: Part Name, Part Description, Advanced Registration Settings, Instructor, Location, No Show Penalty, Pre-work/Post-work/Prerequisite Details, Session Charge Date, Start or End Dates and Times, and Waitlist Deadlines.  The following conditions can be used with this email:   * CURRENT.REGISTRATION, MAX.REGISTRATION, MIN.REGISTRATION * NO.SHOW.PENALTY.CHANGED - Will be triggered when the no-show penalty is changed * PRICE.CHANGED - Will be triggered when the session price is changed * SCHEDULES.CHANGED - Will be triggered when any of the following fields are changed: part name, description, location, room layout, resource, instructor, start/end date/times, display times in time zone of user toggle, time zone, part break, part occurrence, pre-work, post-work * TIMETABLE.CHANGED - Will be triggered if any of the following fields are changed: location, start/end date/times, time zone, part occurrence * INSTRUCTOR.CHANGED - Will be triggered if an instructor is added or removed from a session (changing an instructor from primary to secondary does not trigger the email) * PRE.POST.TRAINING.CHANGED - Will be triggered if a pre-work or post-work is added, removed, or made mandatory (if it is made optional, the email is not triggered) * The COMMENT tag is relevant in combination with this condition. It displays the comments entered by the session administrator or instructor when the changes for this session were saved   This email is sent when the following conditions are met:   * The session is in an Approved status * The last part of the session is not yet finished   When using the condition TIMETABLE.CHANGED or INSTRUCTOR.CHANGED, the email is only triggered if the change concerns at least one current or future part  Note: When the Session Changed email is configured as a meeting invitation, the email will only trigger for parts that are current or in the future. | ILT Administration |

Email Administration Quick Reference Card

Select the following link to download a Quick Reference Card that guides you through the process of managing and creating emails: [**Email Administration Quick Reference Card**](file:///C:/cornerstone-csx-online-help/Content/Resources/Documents/Quick%20Reference%20Cards/Email%20Administration%20QRC.pdf)

1. An administrator would like "Click Here" to appear in the message in place of the HTML link to an online course. He enters "Click Here" in the Alternate Text field and inserts the link into the email. The alternate text "Click Here" displays at the top of the message body. He moves the alternate text to a logical place in the email message. When users receive the email, they click the Click Here link in the email, and the course launches. [↑](#footnote-ref-1)
2. An administrator would like "Click Here" to appear in the message in place of the HTML link to an online course. He enters "Click Here" in the Alternate Text field and inserts the link into the email. The alternate text "Click Here" displays at the top of the message body. He moves the alternate text to a logical place in the email message. When users receive the email, they click the Click Here link in the email, and the course launches. [↑](#footnote-ref-2)