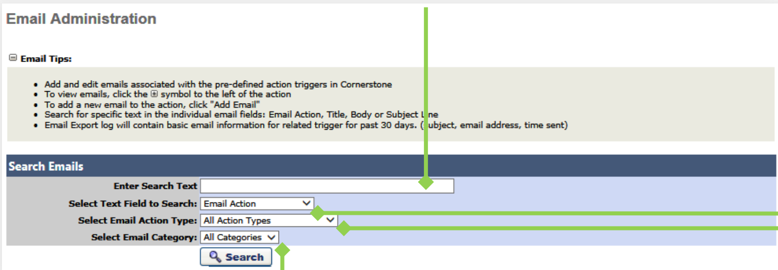
EMAIL ADMINISTRATION - MANAGEMENT

Email Management allows administrators to create and edit emails and associate these emails with pre-defined triggers.

Enter Search Text

Enter Search Text - this is a text box where you can enter any specific text you are searching for. By default it will search in the Email Action unless you change the option under **Select Text Field to Search** drop-down list.



Select Email Category: All Categories

- All Categories
- Confirmation
- Notification
- Reminder
- Promotional

Select Email Category - search on category

Select Text Field to Search: Email Action

- Email Action
- Email Subject Line
- Email Message (Body)

Select Text Field to Search - search on email action, subject or email message (body)

- **Email Action** - search the names of the Email triggers
- **Email Subject Line** - search the text of the Email subject lines in previously created Emails
- **Email Body** - search the text of the Email bodies associated with the previously created Emails

Select Email Action Type: All Action Types

- All Action Types
- Training
- Form Management
- Employee Onboarding
- Instructor Led Training
- Knowledge Management
- Performance Management
- ILT Administration
- System Administration
- Other
- Self Registration
- Certification
- Training Form Management
- Test Engine
- NASD
- License Management
- Succession Management
- Compensation Management
- Observation Checklist
- Billing
- Universal Profile
- Collaborative Learning

Select Email Action Type - search on action type. The action types represent Email trigger groupings related to different areas of the system.

Email Types

Type	Action
Confirmation	Confirms that an action has taken place such as registration or cancellation.
Notification	Notifies the recipient of a training decision, such as when an approver makes a training decision.
Reminder	Serves as a reminder before or after any action, providing extra notice of due dates or expirations. 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. The only emails that work as a reminder are ILT Start Date, Training is Due, and the task reminders emails. Use this option when sending alerts to emphasize upcoming due dates or expirations.
Promotional	Used for promotional purposes.

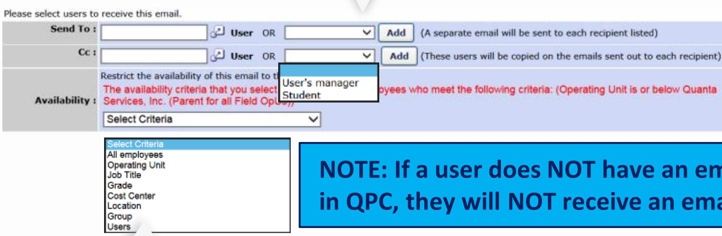
EMAIL ADMINISTRATION - CREATION

Emails can be created to communicate important information to recipients.
The Create New Email page is separated into the following sections: **Title and Address**, **Recipient and Availability**, and **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.

TITLE AND ADDRESS

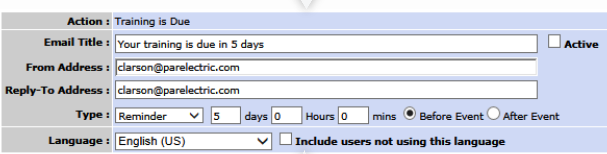
Select student from drop down; if the student does not have an email address, consider using a supervisor or manager's email.



NOTE: If a user does NOT have an email in QPC, they will NOT receive an email.

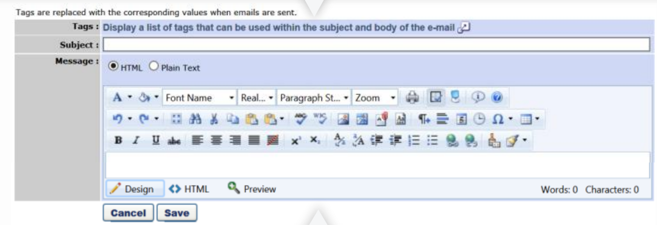
Send To – Once you have selected a user or a role, you must click the Add button, otherwise the email will not fire.
cc - Not required, however we encourage adding either your training director, assigner of the training, supervisor, or manager, to have a record of when the emails are sent and received.

RECIPIENT AND AVAILABILITY



REQUIRED FIELDS
Title – The name of the email template, NOT the subject line of the email; this is not visible to the user.
Active - Check the **Active** box to activate the email. If checked, the email becomes live upon clicking **Save**.
From Address - The inbox from whom the user will receive the email; email addresses must be entered in a valid email address format.
Type - Select an email type from the drop-down.

MESSAGE



Tags – Tags can be used to automatically substitute information specific to the user, and their assignment or task. ***Note: Tags must be entered exactly as they are listed and are case sensitive.***

REQUIRED FIELDS
Subject - What the User will see in the subject line of their email.
Message - Enter the message for recipient. (**Tags** - Tags may be used in this field; click the **Display a list of tags** link to view.)
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.*

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EMAIL ADMINISTRATION - COMMON TRIGGERS

Email Name	Email Description	Action Type
Training is Due	Occurs when training is due. When a due date is applied to training, this email will fire before, on, or after the due date. This is where the Reminder email type can be especially useful. 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 trigger will not fire for training that is in a Completed status.	Training
Assign Training	User is assigned an online class, quick course, event, curriculum, library, posting, test, or material to a user. This email is triggered when training is assigned through Global Search, Course Catalog, or through proxy enrollment.	Training
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, or material. The available recipients for this email are Training request approvers, Assignor of the training, User's manager, or Student.	Approve Training Request
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.	Training
Request Training	This email is triggered when a user clicks the Request button for an online class, quick course, curriculum, library, posting, test, or material. This email can be sent to Students, User's manager, or Next approver if training request is pending. 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 . The approver can then enter the appropriate comments and submit the response.	Training
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. • When an approver clicks one of the included links, the user is automatically directed to the Approve, Deny, or Defer Request page. The approver can then enter the appropriate comments and submit the response.	Instructor Led Training
Certification Period Begin Reminder	This reminder email is triggered when a certification period begins.	Certification
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. If all requirements are complete, this email is not triggered.	Certification

EMAIL ADMINISTRATION – TIPS

Why are emails received by specific users not showing up in the email log?	Only users in the "Send To" box appear in the email log.; users that are Cc'd are not included in the log.
When will a "Training is Due" email be sent to users?	The "Training is Due" email can be configured to fire before or after the due date, but will only fire to users who have not yet completed the training as of the date the email is set to fire. If the user has completed the training by the reminder date, the email will not fire to that user.
How can an email be resent to users?	Marketing Communication allows administrators to create and send ad hoc emails using some of the same features as in Email Administration. Templates can be created and re-used to send emails to groups of users at specific dates and times.
What is the difference between "Before Event" and "After Event?"	When setting up a reminder email, there is an option to send a reminder to fire before the event or after the event. The "event" is the catalyst around which the email is built.
Can custom fields be included in emails?	Many emails are designed to work with specific custom field types (e.g., user custom fields, training custom fields, etc). 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.
Why are emails firing to all users when the availability is not set?	Emails are designed to fire to all users in the portal by default. When setting availability, include all users who need to receive the email while specifically excluding those who do not.
Deep Linking	The Deep Link section lets you add deep links to marketing emails . **Base URL** - Select the base URL from the drop-down (**required field**). • **Default -** 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 page. • **Self-Registration URL** - This option only applies to anonymous self-registration URLs. **Page URL** - Select the page URL from the 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 (**required field**). ***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 –** Add images that can be used in the email or email template. 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 (**optional field**). **Alternate Text** - 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, it displays at the top of the message body in the Message box and can be moved anywhere in the message. When users view the email, the alternate text displays as a link. Example: 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 (**optional field**). ***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** - When checked, the numeric text box is enabled to the right of the checkbox. Enter a future date in the text box or use the calendar option to select a date.. The link expires at 11:59 p.m. in the user's time zone on the date defined (**optional field**). ***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.
Message	**Tags** - Tags may be used in this field. **WYSIWYG Tool** - provides configuration tools, such as images, fonts, colors, formatting, and tables. There is also a *Copy from Word* feature that lets you import from Microsoft Word, preserving the formatting used in the Word document. HTML code can also be used. 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.