

# USER GUIDE

## Notification Center

Administration Section

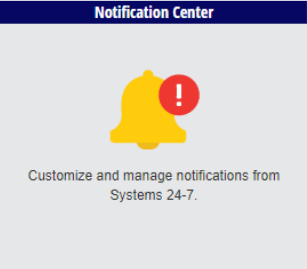
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## The Notification Centre

Systems 24-7 provides a variety of emails sent from the system to communicate with employees. As an **Administrator** for your company; you have the ability to configure and customize these automatic emails using the **Notification Center** feature.

To access the **Notification Center**, access the **Admin** section via the **Admin** button at the top right side of your website. If you do not see this button, you may not have the proper administration privileges in the system.



Once you are in the **Administration** section, click on **Notification Center** to see the Notification Center page and its functions. To set up and manage your email templates, click on **Manage Email Message**.

# Notification Center

Manage Email Message

Manage Email Message

## Manage Email Message

You can use the **Manage Email Message** function to turn on/off email templates, change their frequency or recipients, and customize the content of the emails.

Select the Systems 24-7 feature from the dropdown that you would like to customize the default email for. For example, forgot password or training.

Feature

Please select

Once you have selected the feature, you will see a list of the available email templates you can customize. For example, forgot username and forgot password.

Feature

Forgot Password

Email Name	On/Off	Time Frame	Frequency	Send to	CC To	Failed Email Rediect	Authoring Options
Account Forgot Username	<input checked="" type="radio"/> On <input type="radio"/> Off	0 <div>Days</div> <div>Past</div>	Once	Everyone x	Department Administrator Only x	<input type="radio"/> On <input checked="" type="radio"/> Off	
Account Forgot Password	<input checked="" type="radio"/> On <input type="radio"/> Off	0 <div>Days</div> <div>Past</div>	Once	Everyone x	Department Administrator Only x	<input type="radio"/> On <input checked="" type="radio"/> Off	

Save Settings

For each email template in the table, you will be able to see the following information:

- Email Name:** This is the title of the email template.
- On/Off:** If this setting is on, the system will send out this email template automatically, based on the other settings for the template. If the setting is off, this email template will not be sent out.

**Time Frame:** Some email templates allow you to set up a time frame for when the email will be sent out. Depending on the template, you can set up emails to be sent out at a specific date before or past the email trigger, and you can select this time frame in terms of days, weeks, months, or years. Please note that depending on the situation, the time frames you can select may be restricted. For example, 3 days before training expires.

**Frequency:** Some email templates allow you to choose the frequency with which emails will be sent. By default, this setting is set to once, but some email templates will allow you to choose a recurring schedule, such as once a week. For example, a reminder weekly of expired training. Please note that some email templates may not have this setting available.

**Send To:** This setting will allow you to choose which users will be sent emails, based on their administrative level. Some emails you may want to be sent to Everyone, some to Basic Users Only, some to their Department Admins, or any combination of the available options.

**CC To:** This setting will allow you to have administrators copied on the emails that are sent to your employees. For each employee that is sent an email, all administrators of the chosen level who have access to manage that employee will be copied on the email.

**Failed Email Redirect:** This setting, if turned on, will send an email to the user's Department Admin in a situation where the user does not have an email address, or if the email sent to the user fails or bounces back. If the email to the Department Admin fails, or the Department Admin has no email address, the email is then sent to the Site Admin, and so on up the chain to the Company Admin.

## Editing a Default Email

To edit an email:



Click the edit button under the Authoring Options to customize the subject and body of the email template.

Once you have clicked the Edit button next to an email template, you can make changes to the body and subject line of the email template:

Subject Line \* en fr es

Systems 24-7 Account Forgot Username

Trigger Account Forgot Username ▼

The Trigger field details the system trigger that will cause emails to be sent out automatically. For system default email templates, this field is not editable.



To configure this email template, select **Training** from the **Feature** drop down list. Under authoring options, select the edit button.

The screenshot shows the configuration interface for the 'Course Expiring Soon' email template. It includes a title 'Course Expiring Soon', a status toggle set to 'On', a frequency dropdown set to '2', a unit dropdown set to 'Days', and a time frame dropdown set to 'Before'. The audience is set to 'Everyone' with a selection box. A 'Company Administrator Only' checkbox is also present and is checked. A 'Send' button is visible on the right.

## Outstanding Training

This email is sent to users that have outstanding or expired training courses.

This email template can be configured to go out once, or with a custom frequency; for example, once a week.

To configure this email template, select **Training** from the **Feature** drop down list. Under authoring options, select the edit button.

The screenshot shows the configuration interface for the 'Outstanding Training' email template. It includes a title 'Outstanding Training', a status toggle set to 'On', a frequency dropdown set to '0', a unit dropdown set to 'Custom', and a time frame dropdown set to 'Past'. The audience is set to 'Everyone' with a selection box. A 'Select Some Options' checkbox is also present and is checked. A 'Send' button is visible on the right.

## Account Forgot Username

This email is sent to users as part of the **Forgot your Password** function. Users click this button on the login page, enter their email address, and click Send. Once they have done this, this email is sent to them, along with the **Account Forgot Password** email.

As this template is sent out immediately, the Time Frame and Frequency fields are not editable. The Failed Email Redirect option is also disabled for this email template, as the Forgot your Password function will not work if the user does not enter a valid email address.

To configure this email template, select **Forgot Password** from the **Feature** drop down list. Under authoring options, select the edit button.

The screenshot shows the configuration interface for the 'Account Forgot Username' email template. It includes a title 'Account Forgot Username', a status toggle set to 'On', a frequency dropdown set to '0', a unit dropdown set to 'Days', and a time frame dropdown set to 'Past'. The audience is set to 'Everyone' with a selection box. A 'Select Some Options' checkbox is also present and is checked. A 'Send' button is visible on the right.

## Account Forgot Password

This email is sent to users as part of the **Forgot your Password** function. Users click this button on the login page, enter their email address, and click Send. Once they have done this, this email is sent to them, along with the **Account Forgot Username** email.

As this template is sent out immediately, the Time Frame and Frequency fields are not editable. The Failed Email Redirect option is also disabled for this email template, as the Forgot your Password function will not work if the user does not enter a valid email address.

To configure this email template, select **Forgot Password** from the **Feature** drop down list. Under authoring options, select the edit button.

The screenshot shows the configuration interface for the 'Account Forgot Password' email template. It includes a title 'Account Forgot Password', a status toggle set to 'On', a frequency dropdown set to '0', a unit dropdown set to 'Days', and a time frame dropdown set to 'Past'. The audience is set to 'Everyone' with a selection box. A 'Select Some Options' checkbox is also present and is checked. A 'Send' button is visible on the right.

## Next Review Date Approaching

This email is sent to a list of selected users for library resources that have a “Next Review Date” coming up within a specified time frame. This email alerts them that some kind of review is required on a resource within the libraries.

For this email template, you will need to select either a list of users to email in the **Employee** column, or all users with a specific custom administrator type in the **Send to** column (if this applies to your company).

The Failed Email Redirect option is disabled for this email template, as this template allows you to choose specific users to receive the email.

To configure this email template, select **Library** from the **Feature** drop down list. Under authoring options, select the edit button.

The screenshot shows the configuration interface for the 'Next Review Date Approaching' email template. It includes a title 'Next Review Date Approaching' with 'On' selected. There are dropdowns for '1' (Days) and 'Before'. A frequency dropdown is set to 'Once'. The 'Select Some Options' button is visible. The 'Send to' dropdown is set to 'Admin, Company'. There are 'On' and 'Off' radio buttons, with 'Off' selected. A help icon is on the right.

## Resource Sign Off Expired

This email is sent to users that have previously signed off on a library resource, and that sign-off has now expired. The email includes a list of all expired sign-offs for that user.

As this template is sent out once on the date that a sign-off expires, the Time Frame and Frequency fields are not editable.

To configure this email template, select **Library** from the **Feature** drop down list. Under authoring options, select the edit button.

The screenshot shows the configuration interface for the 'Resource Sign Off Expired' email template. It includes a title 'Resource Sign Off Expired' with 'On' selected. There are dropdowns for '0' (Days) and 'Past'. A frequency dropdown is set to 'Once'. The 'Select Some Options' button is visible. The 'Send to' dropdown is set to 'Company Administrator Only'. There are 'On' and 'Off' radio buttons, with 'Off' selected. A help icon is on the right.

## New Account Username

This email, along with the **New Account Password** email, is sent when a new user is added using the **Add Employee** function, if the administrator selected the option to send the employee their username and password in an email.

As this template is sent out immediately, the Time Frame and Frequency fields are not editable. The Failed Email Redirect option is also disabled for this email template, as a valid email address is required for this function.

To configure this email template, select **New Account** from the **Feature** drop down list. Under authoring options, select the edit button.

## New Account Password

This email, along with the **New Account Username** email, is sent when a new user is added using the **Add Employee** function, if the administrator selected the option to send the employee their username and password in an email.

As this template is sent out immediately, the Time Frame and Frequency fields are not editable. The Failed Email Redirect option is also disabled for this email template, as a valid email address is required for this function.

To configure this email template, select **New Account** from the **Feature** drop down list. Under authoring options, select the edit button.

## Employee Fails COVID-19 Assessment

This email is sent when a user fails their COVID-19 Screening Assessment and is advised not to enter the workplace. The email includes details from the assessment such as date and time of the screening and a summary of the failed responses.

As this template is sent out immediately, the Time Frame and Frequency fields are not editable. The Failed Email Redirect option is enabled as the Direct Department Administrator and Employee will need to be notified immediately so that proper COVID-19 protocol can take place.

To configure this email template, select **Covid-19 Screening** from the **Feature** drop down list. Under authoring options, select the edit button.

## Activate Account Username

To configure this email template, select **Activate User** from the **Feature** drop down list.

This email is sent when a user has been **reactivated** in the system under the **Manage Employee** settings. This email, along with the account password, are sent to the user in two separate emails for security reasons.

As this email is sent out immediately, the Time Frame and Frequency fields are not editable. The Failed Email Redirect option is also disabled for this email template, as a valid email address is required for this function. You do not have any authoring options for this email.



## Activate Account Password

This email is sent when a user has been **reactivated** in the system under the **Manage Employee** settings. This email, along with the account username, are sent to the user in two separate emails for security reasons. The password sent is only temporary and the user is expected to update the password upon login under the **Profile** tab.

As this email is sent out immediately, the Time Frame and Frequency fields are not editable. The Failed Email Redirect option is also disabled for this email template, as a valid email address is required for this function. You do not have any authoring options for this email.

To configure this email template, select **Activate User** from the **Feature** drop down list.

## Survey Added

This email is sent when a survey has **been added and posted to Systems 24-7**. When you add a survey, you can select a postdate if you do not want the survey to be posted immediately. This email template does not send until the survey is posted and users have access to completing it.

In addition, this email is only sent if the survey itself was set-up with email notifications turned on for the survey. See **Survey – Administration User Guide** for additional details as needed.

To configure this email template, select **Survey** from the **Feature** drop down list. Under authoring options, select the edit button on the survey added email.

## Survey Reminder

This email is sent when a user has been **assigned a survey** on Systems 24-7 and it has not been completed.

The admin of the notification centre can determine when this email is sent out after the survey has been created. This email is only sent if the survey itself was set-up with email notifications turned on for the survey. See **Survey – Administration User Guide** for additional details as needed.

To configure this email template, select **Survey** from the **Feature** drop down list. Under authoring options, select the edit button on the survey reminder email.

## Survey Responses

This email is sent when a user has **completed a survey** and includes a copy of the survey responses.

This email is only sent if the survey itself was set-up with email notifications turned on for the survey. See **Survey – Administration User Guide** for additional details as needed.

To configure this email template, select **Survey** from the **Feature** drop down list. Under authoring options, select the edit button on the survey responses email.

## Time Off/Shift Change Request Submitted

This email is sent to selected administrators when a user has **submitted a time off request** through the Employee Scheduler program.

To configure this email template, select **Employee Scheduler** from the **Feature** drop down list. Under authoring options, select the edit button.

## Time Off/Shift Change Request Updated

This email is sent to selected administrators when a user has **updated a time off request** through the Employee Scheduler program.

To configure this email template, select **Employee Scheduler** from the **Feature** drop down list. Under authoring options, select the edit button.

## Time Off/Shift Change Request Cancelled

This email is sent to selected administrators when a user has **cancelled a time off request** through the Employee Scheduler program.

To configure this email template, select **Employee Scheduler** from the **Feature** drop down list. Under authoring options, select the edit button.

Time Off/Shift Change Request Canceled

☒ On ☐ Off

0

Once

Direct Company Administrator x

Company Administrator Only x

Days

Past

☐ On ☒ Off

## Time Off/Shift Change Request Approved

This email is sent when an administrator has **approved a time off request** through the Employee Scheduler program.

To configure this email template, select **Employee Scheduler** from the **Feature** drop down list. Under authoring options, select the edit button.

Time Off/Shift Change Request Approved

☒ On ☐ Off

0

Once

Everyone x

Company Administrator Only x

Days

Past

☐ On ☒ Off

## Time Off/Shift Change Request Declined

This email is sent when an administrator has **declined a time off request** through the Employee Scheduler program.

To configure this email template, select **Employee Scheduler** from the **Feature** drop down list. Under authoring options, select the edit button.

Time Off/Shift Change Request Declined

☒ On ☐ Off

0

Once

Everyone x

Company Administrator Only x

Days

Past

☐ On ☒ Off