

USER GUIDE

System Reports - Email Functionality

Administration User Guide

System Reports: Email Functionality

Both the basic and detailed training reports on Systems 24-7 provide administrators with email functionality directly within the reports to communicate to employees when training is incomplete.

Email functionality within the Basic Training Report

To utilize the email functionality within the **Basic Training Report** follow these steps.

Step 1: Under your **Admin** settings, select **System Reports**.

Step 2: From the reports list, select **Basic Training Report**.

Basic Training Report

In this report you see a basic overview of the training progress of all users within your organization. This is permission-based, so you can only see your report based on what you have permission to see.

Step 3: Select the preferred report type.

Report Type: ☐ Complete ☐ Incomplete ☒ Both

Step 4: Apply any other alternative filters, such as department, course type, delivery type, etc.

Step 5: Select the **Generate Report** button to create the basic training report.

To Notify All Employees with Incomplete Training

Step 1: Select the **Email** button in the top right-hand corner of the report options.



Step 2: A pop-up appears with the defaulted email content. You can customize the information in the email which will be sent to all employees in the report with incomplete training. If you wish to CC the department admin to inform them of the incomplete training, select the option.

EMAIL NOTIFICATION [X]

Subject: Notice of Outstanding Training

Message:

This email is inform you that you have outstanding training.
The list below includes modules that are either incomplete or expired.

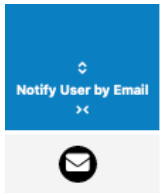
☐ CC Department Admins

Send Email

Step 3: Select send email to send the notification to employees with incomplete training.

To Notify A Specific Employee About Incomplete Training

Step 1: In the report output, identify the employee with incomplete training. Beside their name is an option to **notify the user by email**. Select the option.



Step 2: A pop-up appears with the defaulted email content. You can customize the information in the email which will be sent to all employees in the report with incomplete training. If you wish to CC the department admins to inform them of the incomplete training, select the option.

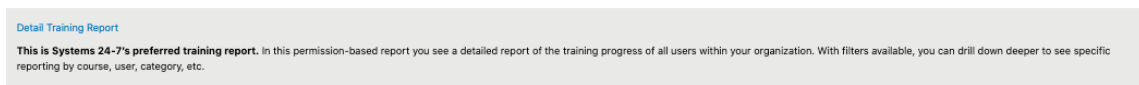
Step 3: Select send email to send the notification to the selected employee with incomplete training.

Email functionality within the Detail Training Report

To utilize the email functionality within the **Detail Training Report** follow these steps.

Step 1: Under your **Admin** settings, select **System Reports**.

Step 2: From the reports list, select **Detail Training Report**.



Step 3: Select the preferred report type.

Step 4: Apply any other alternative filters, such as department, category, user, course name, etc.

Step 5: Select the **Generate Report** button to create the basic training report.

To Notify All Employees with Incomplete Training

Step 1: Select the **Email** button in the top right-hand corner of the report options.

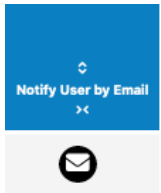


Step 2: A pop-up appears with the defaulted email content. You can customize the information in the email which will be sent to all employees in the report with incomplete training. If you wish to CC the department admin to inform them of the incomplete training, select the option.

Step 3: Select send email to send the notification to employees with incomplete training.

To Notify A Specific Employee About Incomplete Training

Step 1: In the report output, identify the employee with incomplete training. Beside their name is an option to **notify the user by email**. Select the option.



Step 2: A pop-up appears with the defaulted email content. You can customize the information in the email which will be sent to all employees in the report with incomplete training. If you wish to CC the department admins to inform them of the incomplete training, select the option.

Step 3: Select send email to send the notification to the selected employee with incomplete training.