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Introduction

Your Health & Safety E-Learning Platform comes with a built in suite of automatic email notifications. As an administrator you have the ability to customise the text of the emails and control the circumstances that cause the emails to be sent. This document is intended to provide you with all the information you will need to manage the notifications sent by the platform.

Available Notifications

The table below details all the notifications that are currently available and under what circumstances they will be sent. You can use this to decide which (if any) notifications you will use.

Notification	Recipient (selected by role)	Function	Trigger	Notes
New user account	Sent to all users so no role can be selected	Advises users of their login credentials	When a new user account is created	Does not repeat

Notification	Recipient (selected by role)	Function	Trigger	Notes
Incomplete course	Employee	Advises users who have not completed a course that it is overdue. A separate email is sent for each incomplete course.	X days after a person has been added to a course if it has not been completed. The number of days must be specified by an administrator	Will repeat until the course is completed. A separate email is sent for each course the user is enrolled in. Repeat interval must be specified by an administrator.
Incomplete course	Company manager	Advises managers that a user who reports to them has not completed a course. A separate email is sent for each user and each incomplete course.	X days after a person has been added to a course if it has not been completed. The number of days must be specified by an administrator	Will repeat until the course is completed. A separate email is sent for each course and each employee. Repeat interval must be specified by an administrator.
Incomplete course	Company admin	Advises administrators of all users who have not completed a course. A separate email is sent for each user and each incomplete course.	X days after a person has been added to a course if it has not been completed. The number of days must be specified by an administrator	Will repeat until the course is completed. A separate email is sent for each course and each employee. Repeat interval must be specified by an administrator.
Incomplete course digest	Employee	Advises users of all courses they have not yet completed and how long they are overdue. Consolidates all data into a single email.	X days after a person has been added to a course if it has not been completed. The number of days must be specified by an administrator	Will repeat until all courses are completed. Repeat interval must be specified by an administrator.

Notification	Recipient (selected by role)	Function	Trigger	Notes
Incomplete course digest	Company manager	<p>Advises managers of the incomplete courses of all users who report to them and how many days they are overdue. Also provides a link to a full report.</p> <p>Consolidates all data into a single email.</p>	X days after a person has been added to a course if it has not been completed. The number of days must be specified by an administrator	Will repeat so long as there are any users reporting to the manager who have not completed all of their courses. Repeat interval must be specified by an administrator.
Incomplete course digest	Company admin	<p>Advises administrators of the incomplete courses of all users and how many days they are overdue. Also provides a link to a full report.</p> <p>Consolidates all data into a single email.</p>	X days after a person has been added to a course if it has not been completed. The number of days must be specified by an administrator	Will repeat so long as there are any users who have outstanding courses. Repeat interval must be specified by an administrator.
Advance notice of repeat training	Sent to all users so no role can be selected.	When repeat training has been configured will email users to advise them that their training will soon be reset for repeat training.	X days before the training is due to be reset. The number of days' notice must be specified by an administrator	Does not repeat
Course reset for repeat training	Sent to all users so no role can be selected.	When repeat training or a bulk reset has been configured will email users to advise them that their training has been reset for repeat training.	When training is reset	Does not repeat.
New file added	Sent to all users so no role can be selected.	Advises users that a new document has been added to the <i>Policy Hub</i> .	When a new document is added to the <i>Policy Hub</i> by an administrator.	Only available on platforms that have the <i>Policy Hub</i> installed. Does not repeat.

Notification	Recipient (selected by role)	Function	Trigger	Notes
After submission of self-assessment	Company manager	Advises a manager that a user who reports to them has submitted a new risk-assessment	When a user who reports to that manager submits a risk-assessment	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Does not repeat.
After submission of self-assessment	Company admin	Advises administrators when any user has submitted a new risk-assessment	When any user submits a risk-assessment.	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Does not repeat.
New comment in self-assessment	Employee	Advises users of any new comments added to their risk-assessment. Text of the comment is included in the email.	When an employee's manager or an administrator adds a new comment to the employee's risk-assessment.	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Does not repeat.
New comment in self-assessment	Company manager	Advises managers of any new comments added to the risk-assessment of users who report to them. Text of the comment is included in the email.	When an employee or administrator adds a new comment to an employee's risk-assessment.	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Does not repeat.

Notification	Recipient (selected by role)	Function	Trigger	Notes
New comment in self-assessment	Company admin	Advises admins when a comment is made in any risk-assessment. Text of the comment is included in the email.	When any new comment is added to any user's risk-assessment.	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Does not repeat.
Self-Assessment digest	Employee	Advises a user of any changes that have been made to their self-assessment in the last x days and who made those changes.	On the notification's scheduled day when a comment has been added or an issue resolved in a user's self-assessment within the timeframe specified. The number of days to look back must be specified by an administrator	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Repeat interval must be specified by an administrator.
Self-Assessment digest	Company manager	Advises a manager of any changes that have been made to the self-assessments of users who report to them in the last x days and who made those changes.	On the notification's scheduled day when a comment is added or an issue resolved in the self-assessment of a user who reports to that manager within the timeframe specified. The number of days to look back must be specified by an administrator	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Repeat interval must be specified by an administrator.

Notification	Recipient (selected by role)	Function	Trigger	Notes
Self-Assessment digest	Company admin	Advises admins of any changes that have been made to user's self-assessments in the last x days and who made those changes.	On the notification's scheduled day when a comment is added or an issue resolved in the self-assessment of any user who reports to that manager within the timeframe specified. The number of days to look back must be specified by an administrator	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Repeat interval must be specified by an administrator.
When all issues in the Self-Assessment are resolved	Employee	Advises a user that all their risk-assessment issues have been resolved	When the last outstanding issue in a user's risk-assessment is resolved.	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Does not repeat.
When all issues in the Self-Assessment are resolved	Company manager	Advises a manager when all the risk-assessment issues of an individual user who reports to them have been resolved.	When the last outstanding issue in a user's risk-assessment is resolved.	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Does not repeat.
When all issues in the Self-Assessment are resolved	Company admin	Advises administrators when all the risk-assessment issues of an individual user have been resolved.	When the last outstanding issue in any user's risk-assessment is resolved.	Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed. Does not repeat.

Notification	Recipient (selected by role)	Function	Trigger	Notes
Unresolved issues reminder	Company manager	Alerts a manager to unresolved issues in the self-assessment of a user who reports to them.	When an issue has been unresolved for a number of days. The number of days must be specified by an administrator.	<p>Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed.</p> <p>Will repeat as long as there are unresolved issues in the risk-assessment. Repeat interval must be specified by an administrator.</p>
Unresolved issues reminder	Company admin	Alerts administrators to any unresolved issues in a user's self-assessment.	When an issue has been unresolved for a number of days. The number of days must be specified by an administrator.	<p>Only available on platforms that have the <i>Display Screen Equipment</i> and/or <i>Health & Safety Training for Home Workers</i> courses installed.</p> <p>Will repeat as long as there are unresolved issues in the risk-assessment. Repeat interval must be specified by an administrator.</p>

Viewing Your Current Notifications

You can manage your notifications and confirm which are active via **Administration > Settings > Manage notifications**.

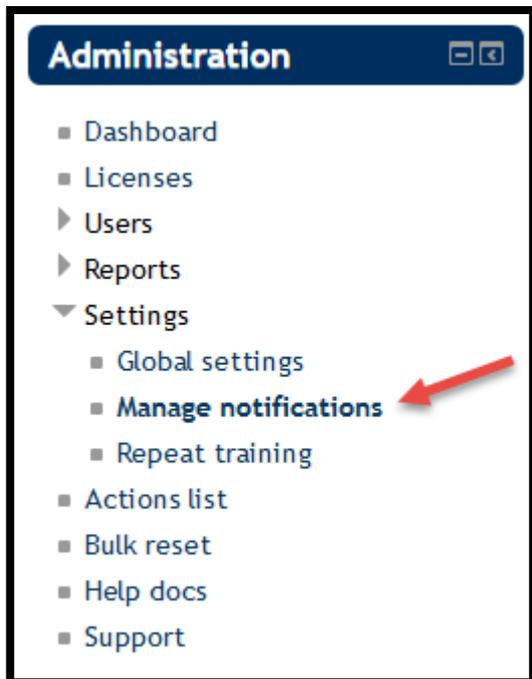


FIGURE 1 – ACCESSING NOTIFICATIONS VIA THE ADMINISTRATION BLOCK

The *Manage notifications* screen shows you a list of the notifications that have already been setup on your platform and whether they are active or not. The screen consists of an area to allow you to add new notifications followed by a table of those currently installed. The columns in the table provide the following information/function:

- **Subject:** The subject of the email sent by the notification
- **Event name:** The name of the notification that denotes its function
- **Recipient:** The role targeted by the notification
- **Active:** Is the notification currently switched on?
- **Translation:** If multi-language support has been enabled on your platform, this allows you to provide versions of a notification in alternative languages
- **Edit:** Allows you to configure and activate/deactivate the notification
- **Delete:** Allows you to delete the notification

Manage notifications ?

▼ Add new

Event name*

Add new

There are required fields in this form marked *.

Subject	Event name	Recipient	Active			
Repeat training for compliance	Course reset for repeat training	Employee	Yes	Translation	Edit	Delete
Risk assessment issues resolved	When all issues in the Self Assessment are resolved	Employee	No	Translation	Edit	Delete
New comment in Self Assessment	New comment in Self Assessment	Company manager	Yes	Translation	Edit	Delete
New comment in Self Assessment	New comment in Self Assessment	Employee	Yes	Translation	Edit	Delete
New account	New user account	-	Yes	Translation	Edit	Delete
You have incomplete courses	Incomplete course digest	Employee	Yes	Translation	Edit	Delete
You have employees who are incomplete	Incomplete course digest	Company admin	Yes	Translation	Edit	Delete
You have employees who are incomplete	Incomplete course digest	Company manager	Yes	Translation	Edit	Delete

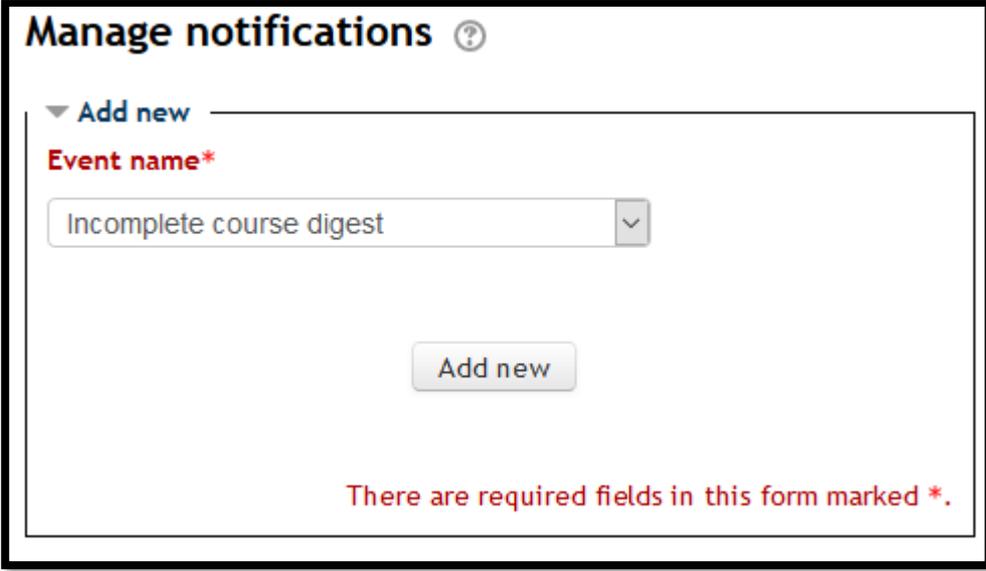
FIGURE 2 - THE MANAGE NOTIFICATIONS SCREEN

Adding a Notification to Your Platform

Let's go through the process required to create a new notification on your platform.

Step One: Creating the Notification

1. Access the *Manage notifications* screen via **Administration > Settings > Manage notifications**
2. Select the notification you wish to create using the **Add new > Event name** dropdown
3. Click on the Add new button



The screenshot shows the 'Manage notifications' interface. At the top left, there is a header 'Manage notifications' with a help icon. Below it, there is a section titled 'Add new' with a dropdown arrow. Underneath, the label 'Event name*' is displayed in red. A dropdown menu is open, showing the selected option 'Incomplete course digest'. Below the dropdown is a button labeled 'Add new'. At the bottom of the form, a red message states: 'There are required fields in this form marked *.'

FIGURE 3 - ADDING A NEW NOTIFICATION

Step Two: Configuring the Notification

You will now be able to configure your notifications exactly as required. The options available will be dependent on the function of the notification. For this example, we are going to use the *Incomplete course digest* notification.

The screenshot shows a configuration window titled 'Edit' for the 'Incomplete course digest' notification. The fields are as follows:

- Event name:** Incomplete course digest
- Subject*:** You have courses that are incomplete
- Content*:** Dear {employee_firstname},
The following is a list of your incomplete courses and how many days they are overdue:
{overdue_list}
Please complete these courses as soon as possible.
Kind regards
Health & Safety Team
- Day to send (if weekly)*:** Monday
- Repeat after*:** 7
- Days overdue*:** 14
- Active:** Yes
- Recipient*:** Employee

Below the content field, there is a legend for placeholders:

- {employee_firstname} - Employee first name
- {employee_lastname} - Employee last name
- {report_link} - Course completion report
- {overdue_list} - Overdue list
- {link} - Link

FIGURE 4 - CONFIGURING THE INCOMPLETE COURSE DIGEST NOTIFICATION

The options that will appear on the *Incomplete course digest* notification are:

- Subject
 - The text that will appear in the subject line of the email
- Content
 - The content of the email body. You can use the placeholders listed below the content box to have the email automatically fill in the correct details and information for each recipient
- Day to send (if weekly)
 - If the notification is set to repeat every seven days, this is the day of the week it will be sent
- Repeat after
 - How often the notification should repeat (in days). In the case of *the Incomplete course digest* notification, the email will repeat until all the user has completed all of their outstanding courses
- Days overdue

- How many days overdue a person should be before the reminder begins
- Active
 - Is the notification currently activated? You can enable or disable any notification in this way
- Recipient
 - Which role should the user have in order to receive this notification. As can be seen from the table at the beginning of this document (pages 1 to 6), the recipient chosen will sometimes affect the information provided by the notification.

More information about all these settings can be found by clicking on question mark icon next to the setting.

Step Three: Targeting the Notification

Notifications can be targeted in two ways

- By their role
- By their profile data

Selecting by role

Selecting a role in most cases will determine not just who the notification is sent to but how it behaves. For example, in the *Incomplete course digest* notification above the role selected will have the following effect:

- **Employee:** The email will be sent to each employee informing them of their outstanding training.
- **Company manager:** The email will be sent to company managers advising them of the outstanding training of any staff who report to them.
- **Company admin:** the email will be sent to site administrators advising them of all users on the platform with outstanding training.

Selecting by profile data

As an administrator you have the ability to directly target groups of staff by the data held in their profiles.

Notifications can be targeted by:

- City/town
- Department
- Institution

For example, you may wish the email notification text to differ depending on the recipient's department or you may have a local health & safety contact for each location and wish to include this specific information in notifications. A full guide to selective notifications can be found here:

<https://britsafesupport.zendesk.com/hc/en-gb/articles/360000204814>

If you do not wish to use selective notifications simply click the **Select all** link in the location, Department and Institution sections.

▼ **City/town**

Important:

This notification will only be sent to users who have the options you have ticked in their profile. To send this notification to all users make sure all the entries are selected.

Select All

Deselect All

- EMPTY FIELD
- Dublin
- Edinburgh
- London
- Selenium

▼ **Department**

Select All

Deselect All

- EMPTY FIELD
- Finance
- Human Resources
- IT

▼ **Institution**

Select All

Deselect All

- EMPTY FIELD

FIGURE 5 - THE SELECTIVE NOTIFICATIONS OPTIONS

Step Four: Saving the notification

Once you have chosen your notification settings, scroll to the end of the page and click the **Save changes** button to create your notification.

Editing an Existing Notification

Once you have created a notification you can return to edit it at any time by navigating to the *Manage notifications* screen via **Administration > Settings > Manage notifications** and clicking the **Edit** link adjacent to the notification you wish to edit.

You can then make any changes as necessary and save them using the **Save changes** button at the end of the editing screen.

Viewing Sent Notifications

The platform keeps a record of any notifications that have been sent. If you wish to view these notifications, you can access them via the *Message History* report. To do so:

1. Go to **Administration > Reports > Message history**
2. If needed, use the filters to narrow the focus to pinpoint specific users, departments, locations or time-frames (click on the **Show more** link to expand the filters)
3. Click the **Submit** button to view the report on screen or the **Export** button to download the report as a spreadsheet file

The report will contain the full text of any email sent, when it was sent and who it was sent to.