

e-KSF (the KSF online Tool)

Defining Global E-mail Alerts

The following document describes how you, as e-KSF Administrator, can customise global e-mail alerts for the users of tool. It is assumed you have already got e-KSF Administrator access. If not, please contact the support desk.



1. Defining Global E-mail Alerts

From version 6.0, e-KSF has a very flexible email alert system built-in. e-KSF administrators can define specific email text to send to users, and specific timescales, for a wide range of key e-KSF events. For example, administrators can send an initial reminder about upcoming pay increment date to reviewer and reviewee 40 days before the increment date, and then if a review isn't created the administrator can set e-KSF to automatically email the manager and reviewee with a different, stronger, message 7 days before the increment date.

The following section describes how you, as an e-KSF Administrator, can customise e-mail alerts for e-KSF users in your organisation in this way.

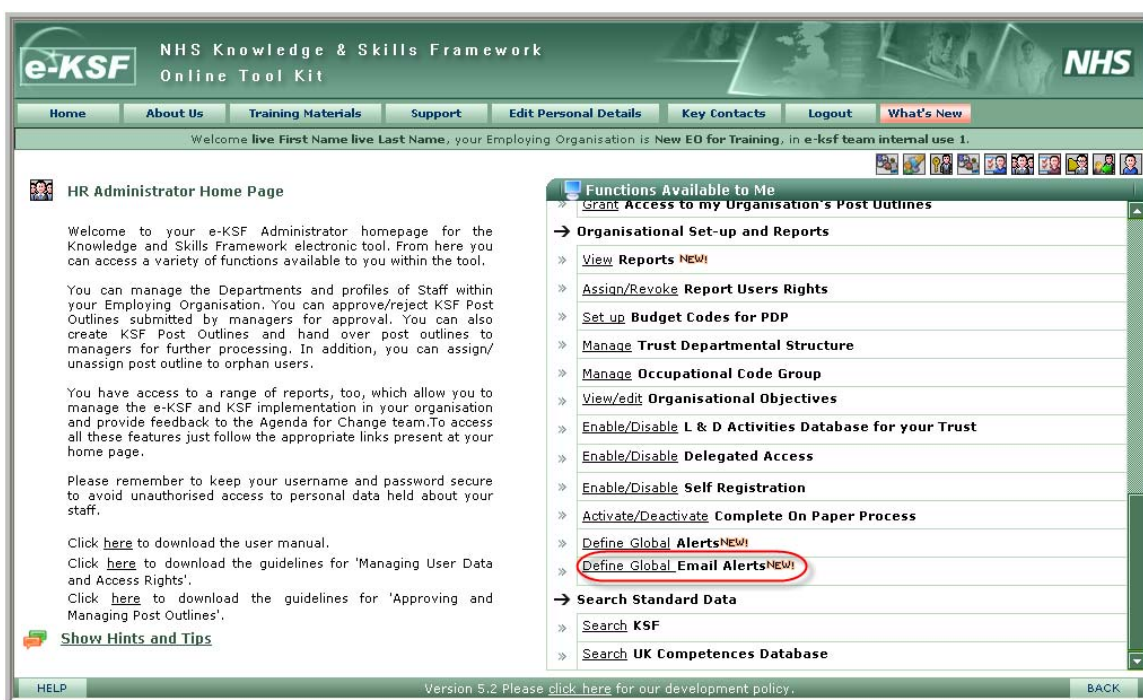


Figure 1: EKSF Administrators' Home Page

To customise a global e-mail alert, please start by clicking on the “Define Global E-mail Alerts” link, circled above in red, on your e-KSF Administrator home page. A new window will be opened in front of you containing the list of all existing e-mail alert templates, with three icons against each email title (see Figure 2, overleaf).

Click the **'Edit'** icon in front of required template to define/edit an e-mail alert by customising the templates from main database.

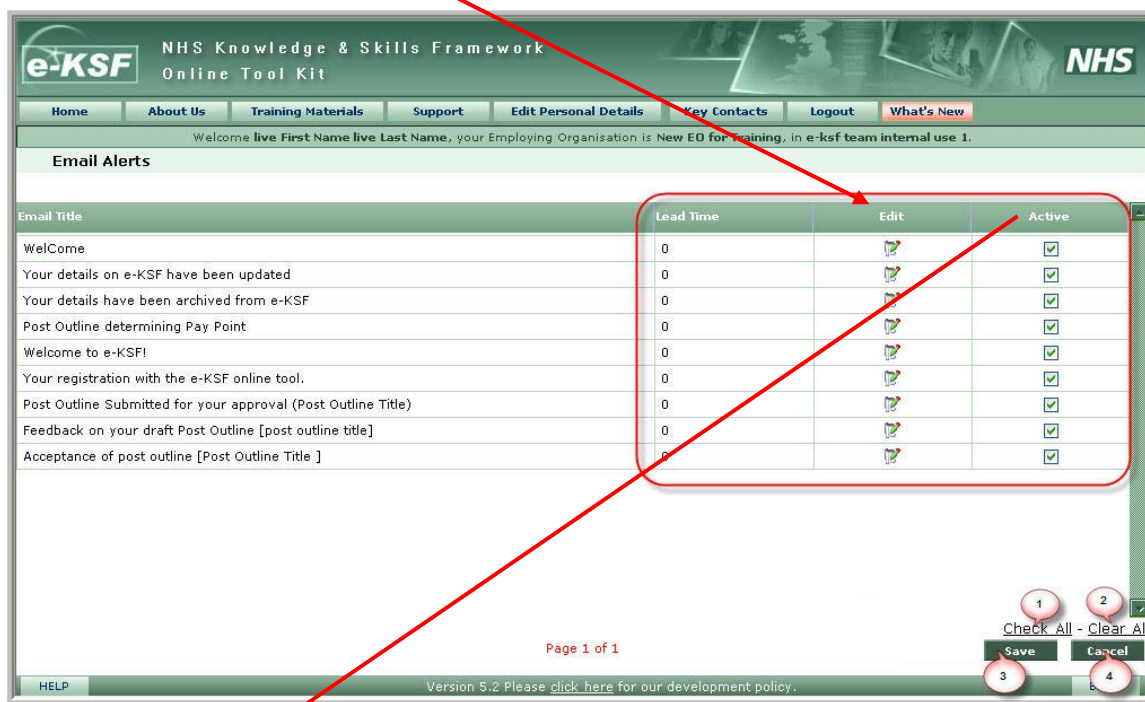


Figure 2: Global E-mail Alert Page

A particular e-mail alert can also be activated/deactivated by clicking on the respective check box titled **'Activate'** (provided on 'Global E-mail Alert' window). If the box is checked, it means that this particular alert is enabled- i.e. it will be active and working as required. If the box is unchecked, it means that this particular alert is disabled – i.e. it will be stopped from functioning. 'Lead time' (reminder periods) will be discussed later in document.

On this page you can also see five buttons at bottom right side, marked as 1, 2, 3, 4 and 5.

1. You can select all the alerts collectively by clicking **'Select All'**.
2. To clear any/all selection click **'Clear All'**.
3. If you make some changes in the list of all alerts, you can save these by clicking **'Save'** button. This will open a display message to verify if your e-mail has been configured successfully or not.
4. To go back to E-KSF Administrator home page click **'Cancel'** button. This will take you to your home page without saving any changes that you made in alerts, on this page.

2. Defining Global E-mail Alerts

Clicking on the 'Edit' icon against a required template, on 'Global E-mail Alerts' window (Figure 2), will open a new window where you can define/edit an e-mail alert by customising the templates from main database.

There are two types of e-mail alerts: with reminders or without reminders.

E-mail alerts based on trigger actions are those that will be sent automatically when a user performs some particular action, like if a new user gets registered (etc. Such e-mail alerts are defined here, only by using templates from database. Different user actions will generate e-mails with different contents and also will be addressed differently, depending on the relevant recipient.

E-mail alerts based on dates are those that will be sent to relevant users automatically a set number of days before some particular e-KSF date, as specified in reminder by E-KSF Administrator.

Templates for both these are provided in database. If you want to customise an alert based on a trigger action, you will see a window containing only the template for e-mail (see Figure 3). However, if you choose to customise an alert based on a date, you will be taken to a window containing the template for e-mail alert plus a space for specifying the exactly how long before the date you want the email to be sent (see Figure 4).

Figure 3: Edit Global E-mail Alert – based on trigger event

2.1 Customising E-Mail Alert based on trigger events

You'll need to consider each of the 5 fields to customise an email based on a trigger event: E-mail Audience, E-mail Title, E-mail Subject, Merge Fields and E-mail Text (Highlighted as 1, 2, 3, 4 and 5 in Figure 3). Let's discuss each one by one.

1. **E-mail Audience:** You will see three check boxes in front of this field: 'Manager', 'Reviewer' and 'Staff'. You can select the required audience by clicking the respective check boxes.
2. **E-mail Title:** You can specify the suitable title for this particular e-mail alert in this field.
3. **E-mail Subject:** You can provide a suitable subject for this particular e-mail alert here in this field.
4. **Merge Field:** Here you can specify the way you want to address the person; for example, if you want to address the person in order 'first name-last name' or only 'first name'.

TO add a merge field, move your cursor to the correct part of your email text, and then select the field from drop down menu titled 'Merge Field' and click '**Insert Field**' button, as shown in Figure 4. (For example if you want to address the person by giving his first name, select 'First Name' and click the button '**Insert Field**'.)

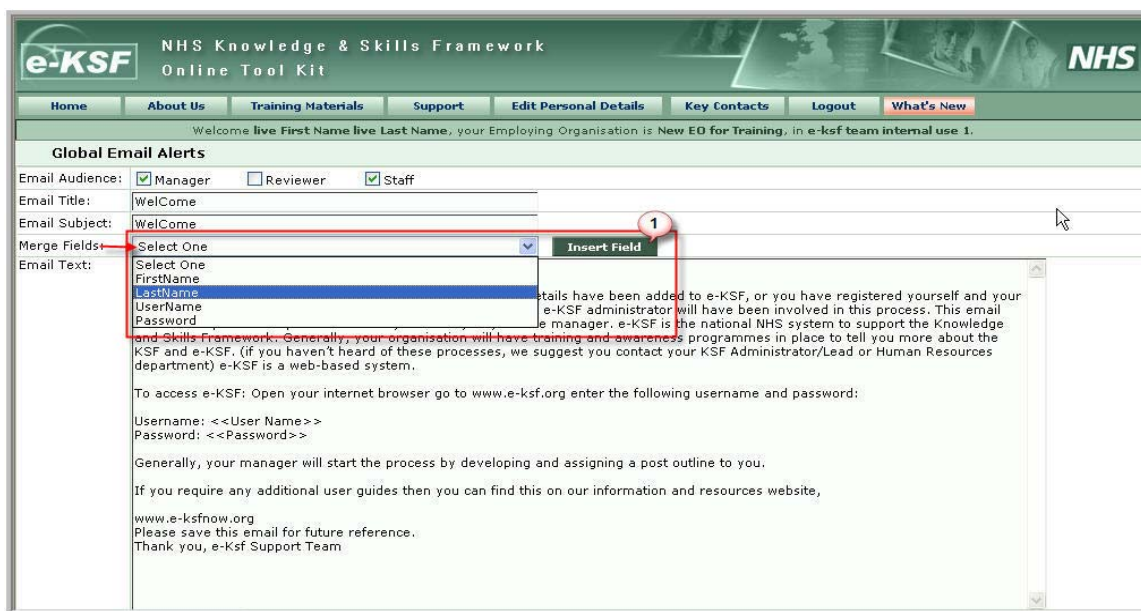


Figure 4: Edit Global E-mail Alert – Merge Field

You can insert multiple fields into a single email, allowing you to do things like address an email to "firstname lastname".

5. **E-mail Text:** you can write or edit the main body of the text here.

Spell Check: You can also check the spelling of the email by clicking the spell check button on this page.

After specifying all the details, click **'Save'** button to save that particular E-mail Alert. To go back to previous page without saving anything, click **'Cancel'**. (See Figure 3 – buttons are highlighted at bottom right).

2.2 Customizing E-Mail Alerts Based on Dates

The screenshot displays the 'Global Email Alerts' configuration interface. At the top, there's a navigation bar with links like Home, About Us, Training Materials, Support, Edit Personal Details, Key Contacts, Logout, and What's New. Below this, a welcome message is shown. The main form area includes:

- Email Audience:** Checkboxes for Manager (checked), Reviewer, and Staff (checked).
- Email Title:** Text field containing 'WelCome'.
- Email Subject:** Text field containing 'WelCome'.
- Merge Fields:** A dropdown menu set to 'Select One' with an 'Insert Field' button.
- Email Text:** A large text area containing a pre-written email template. The template starts with 'Dear <<First Name>>' and provides information about the e-KSF system, including a URL (www.e-ksf.org) and login instructions.
- Check Spellings:** A button with a red circle and the number '1' next to it.
- Reminder Days:** A section highlighted with a red box. It features an 'Add Reminders' button and a table with two rows: '12' and '15'. A red circle with 'X' marks is positioned over the table.
- Save and Cancel:** Buttons at the bottom right, highlighted with a red oval.

Figure 5: Edit Global E-mail Alert- With Reminders

For customizing e-mail alerts based on dates, your screen will display an additional row for specifying the reminders (see Figure 5).

For setting reminders: To send an e-mail to a user, a particular number of days before some activity, write the required number of days in field titled 'Reminder Days' and click **'Add Reminder'** button. Doing this, an e-mail will be sent automatically to the concerned person that many days before some particular activity.

You can set multiple dates for the same email, for example sending the mail 60 days, then also 30 days, before a pay increment date.

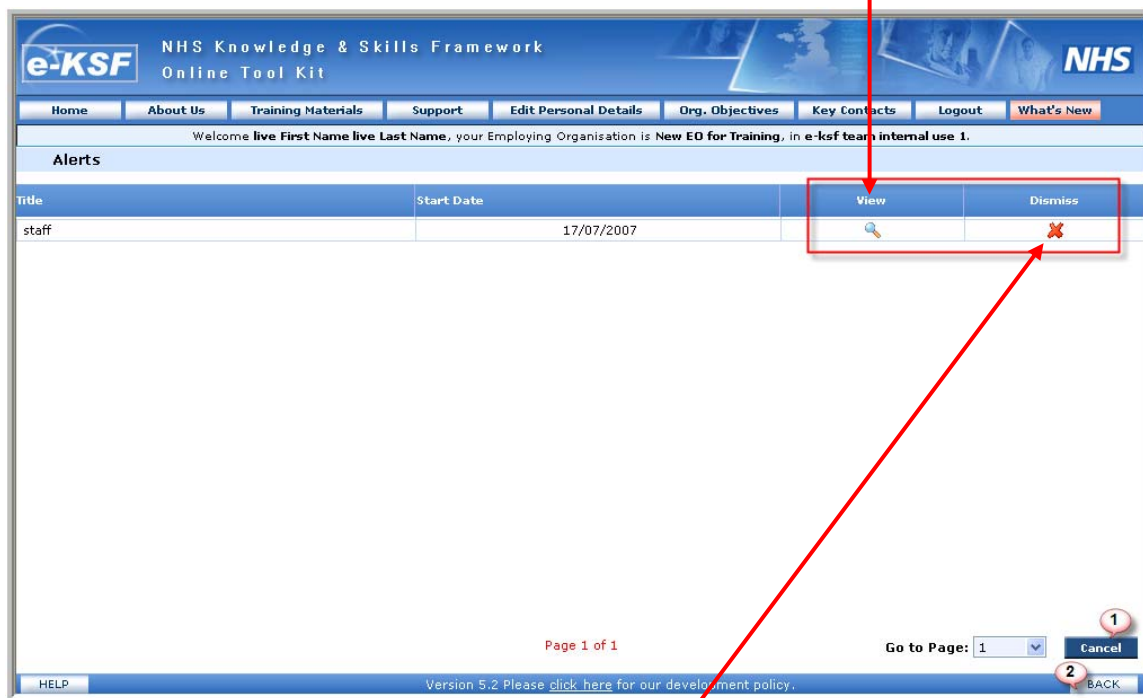
You can only specify whole numbers in these reminder day fields.

After specifying all the details, click **'Save'** button to save that particular E-mail Alert. To go back to previous page without saving anything, click **'Cancel'**. (See Figure 5 – buttons are highlighted at bottom right).

3. Viewing Global E-mail Alerts

Email alerts are sent directly to user's email accounts. Note that e-KSF must have the email address stored for a user, and the user details must have "email address active" ticked, before the emails will be sent.

On clicking "My Alerts", users will see a list of alerts. They can then view the details of an alert by clicking on 'View' icon in front of that particular alert title. A new window will open displaying the details of that particular e-mail alert.



- To disable any alert, click on the respective 'Dismiss' icon given in front of that particular alert.
- To go back to your role's home page, click the button '**Back**' (Highlighted as 2, in bottom right corner in figure above).

This Global E-mail Alert process is just one way in which users can set reminders within the e-KSF tool. Please also see the guide "Global onscreen alerts" to see how you can set general, non-date-specific reminders.

If this guide does not answer all your questions, please take time to write to contact@e-ksf.org or support@e-ksf.org.