Appendix B: Scheduled Offering Notification Trigger Matrix

User Type	Action	Notification Template ID	Spvsr	User	Contact	Instr	Appr1	Appr2	Comments
Admin	Cancel Scheduled Offering	SystemScheduleCancellationNotification	X	X	X	X			All Users status automatically changed to Cancelled.
Admin	Enroll User	SystemEnrollmentNotification	X	X	X	X			
Admin	Waitlist User	SystemWaitlistNotification	X	X	X	X			Non-user template default missing the rollup tags and non-user text.
Admin	Cancel User	SystemScheduleCancellationNotification	X	X	X	X			This should be the withdraw notification.

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User Type	Action	Notification Template ID	Spvsr	User	Contact	Instr	Appr1	Appr2	Comments
	> Autofill from Waitlist	SystemEnrollmentNotification	X	X	X	X			
Admin	Remove User	SystemUnEnrollmentNotification	X	X	X	X			
	> Autofill from waitlist	NONE							
Admin	Cancel to Waitlist	SystemWaitlistNotification	X	X	X	X			Non-user template default missing the rollup tags and non-user text.
Admin	Waitlist to Cancelled	SystemScheduleCancellationNotification	X	X	X	X			
Admin	Enroll to Waitlist	SystemWaitlistNotification	X	X	X	X			Non-user template default missing the rollup tags and non-user text.
	Autofill from waitlist	NONE							
Admin	Edit Segment Times	SystemEnrollmentNotification		X		X			The system resends the notification to users with a status other than cancelled

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User Type	Action	Notification Template ID	Spvsr	User	Contact	Instr	Appr1	Appr2	Comments
		SystemWaitlistNotification		X		X			The system resends the notification to users with a status other than cancelled
		SystemPendingEnrollmentNotification		X		X			Non-user template default missing the rollup tags and non-user text.
User	Enroll	SystemEnrollmentNotification	X	X	X	X			
User	Withdraw	SystemUnEnrollmentNotification	X	X	X	X			User is assigned "Cancelled" status
User	Waitlist	SystemWaitlistNotification	X	X	X	X			Non-user template default missing the rollup tags and non-user text.
User	Withdraw from Waitlist	SystemUnEnrollmentNotification	X	X	X	X			
Users Requiring Approval									

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User Type	Action	Notification Template ID	Spvsr	User	Contact	Instr	Appr1	Appr2	Comments
User	Enroll in Offering requiring approval	ApprovalProcessApprovalRequest		X					
		ApprovalProcessApprovalRequired					X		
Approver 1	Approve Enrollment in Offering requiring approval (1/2 levels of approval)	ApprovalProcessApprovalProgressed		X					
		ApprovalProcessApprovalRequired						X	
Approver 2	Approve Enrollment in Offering requiring approval (2/2 levels of approval)	ApprovalProcessApprovalApproved		X					
		SystemEnrollmentNotification	X	X		X			
Approver 1	Deny Enrollment in Offering requiring approval	ApprovalProcessApprovalDenied		X					
		SystemUnEnrollmentNotification	X	X	X	X			
User	Withdraw from Offering requiring approval	SystemUnEnrollmentNotification	X	X	X	X			
User	Waitlist in Offering requiring approval	ApprovalProcessApprovalRequest		X					

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User Type	Action	Notification Template ID	Spvsr	User	Contact	Instr	Appr1	Appr2	Comments
		ApprovalProcessApprovalRequired					X		This process proceeds the same as an approval for enrollment
User	Withdraw from Waitlist in Offering requiring approval	SystemUnEnrollmentNotification	X	X	X	X			
Supervisor	Enroll User	SystemEnrollmentNotification	X	X	X	X			When Using the Reg. Asst e-mail confirmation boxes are available.
Supervisor	Withdraw User	SystemUnEnrollmentNotification	X	X	X	X			User is removed from the Offering using Registration Assistant, but assigned Cancelled status when assuming the User role. When Using the Reg. Asst e-mail confirmation

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User Type	Action	Notification Template ID	Spvsr	User	Contact	Instr	Appr1	Appr2	Comments
									boxes are available.
Supervisor	Waitlist User	SystemWaitlistNotification	X	X	X	X			Supervisor can exceed maximum registration using Registration Assistant. Forced to Waitlist when assuming the User role.
Supervisor	Waitlist > Withdraw User	SystemUnEnrollmentNotification	X	X	X	X			When Using the Reg. Asst e-mail confirmation boxes are available.

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Appendix C: Basic HTML Tags

The following list contains some basic HTML tags:

Tag	Description
<html>	Defines an HTML document
<p>	Defines a paragraph
 	Inserts a single line break
<hr>	Defines a horizontal rule
	Bold text
	Italicized text
<!-- this is read only -->	Defines a comment This can be helpful to use at the bottom of a Notification Template to keep track of the date of the last update and the person who has made the last change.
<pre> </pre>	Preserve preformatted text (used with the certain syntax tags)
Link Description 	Anchor tag for inserting link to a web page

This website is a good resource for additional help with HTML tags:
http://www.w3schools.com/html/default.asp

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Appendix D: Lab Answer Key and HTML

This appendix contains lab answer keys and HTML.

Lab 1 Answer Key

<LOOP> <label key="notification.Enrollment.MessageText1"/> <&ROLLUP_MESG> </LOOP>	Loop only visible to non-users (supervisors, instructor, contacts)
<LOOP> <label key="notification.Enrollment.MessageText2" arg0="<&ROLLUP_STUD_ID>" arg1="<&ROLLUP_STUD_NAME>"/> </LOOP>	User ID User Last Name, First Name
<label key="notification.Enrollment.MessageText3"/> <&SCHD-CPNT> <&SCHD-DESC> <&SCHD-DESC-EDITABLE	Item Type, ID, Rev Date/Time Item Title Scheduled Offering Description
<label key="notification.Enrollment.MessageText4"/> <&SEG-GRID>	Segment Start Date/Time, End Date/Time, Instructor, Facility, Location
<label key="notification.Enrollment.MessageText5"/> <&SEG-FACILITY>	Scheduled Offering Facility ID and other descriptions entered for the Facility record.

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```
<LOOP>
<label
key="notification.Enrollment.MessageTe
xt1"/>
<&ROLLUP_MESG>
</LOOP>
<LOOP>
<label
key="notification.Enrollment.MessageTe
xt2"
arg0="<&ROLLUP_STUD_ID>"
arg1="<&ROLLUP_STUD_NAME>"/>
</LOOP>
<label
key="notification.Enrollment.MessageTe
xt3"/>
<&SCHD-CPNT>
<&SCHD-DESC>
<&SCHD-DESC-EDITABLE>
<label
key="notification.Enrollment.MessageTe
xt4"/>
<&SEG-GRID>
<label
key="notification.Enrollment.MessageTe
xt5"/>
<&SEG-FACILITY>
```

```
This note confirms your registration in the following learning activity:
COURSE CUST0100 Dec/23/2004 02:38 PM America/New York Excelling at Customer Service Simulation

Focus for CSO Specialist

The schedule is as follows:
Start:    1/15/2013 09:00 AM America/New York
End:      1/15/2013 05:00 PM America/New York
Instructor: Haas, Dianne T
Facility:  New York Office
Location:  New York Classroom 01


If you have any questions about the registration, please contact your learning coordinator.
New York Office
 3100 E 42nd St.
 New York
 NY
 10010
 703.292.0200
 703.292.0200 (fax)
 helpdesk@successfactors.com


If you have any questions about the Scheduled Offering, please contact:
Chase Winters
703-292-0671
Chase.winters@successfactors.com
```

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Lab 2 Answer Key

Label ID	Label Text
“notification.Enrollment.MessageText1"	The following Users received this message
"notification.Enrollment.MessageText2"	{0} - {1}
"notification.Enrollment.MessageText3"	This note confirms your registration in the following learning activity:
"notification.Enrollment.MessageText4"	The schedule is as follows:
“notification.Enrollment.MessageText5"	If you have any questions about the registration, please contact your learning coordinator.
"notification.Enrollment.MessageText6"	Approval Reason:{0}

Lab 4: Adding HTML to a Notification

```
<html>
<LOOP>
<font size="3" face="verdana">
<body bgcolor="#00CCCC">
<label key="notification.Enrollment.MessageText1"/><&ROLLUP_MESG>
<b><u><&ROLLUP_STUD_NAME></u></b><p></font>
</LOOP>

<body bgcolor="#FFFF99">
<font size="3" face="verdana">
<&STUD-FIRST> <&STUD-LAST>:<p>
This is to confirm your registration into: <b><u><&SCHD-DESC></u></b><br><hr>
The schedule for this offering is:<p>
<pre><b><&SEG-GRID></b></pre><hr>
For questions regarding this event please contact:<P></font>
<font color="#660033" size="3" face="verdana">
<b><&SCHD-CONTACT><br>
<&SCHD-CONTACT-PHONE></b></font>
</html>
```

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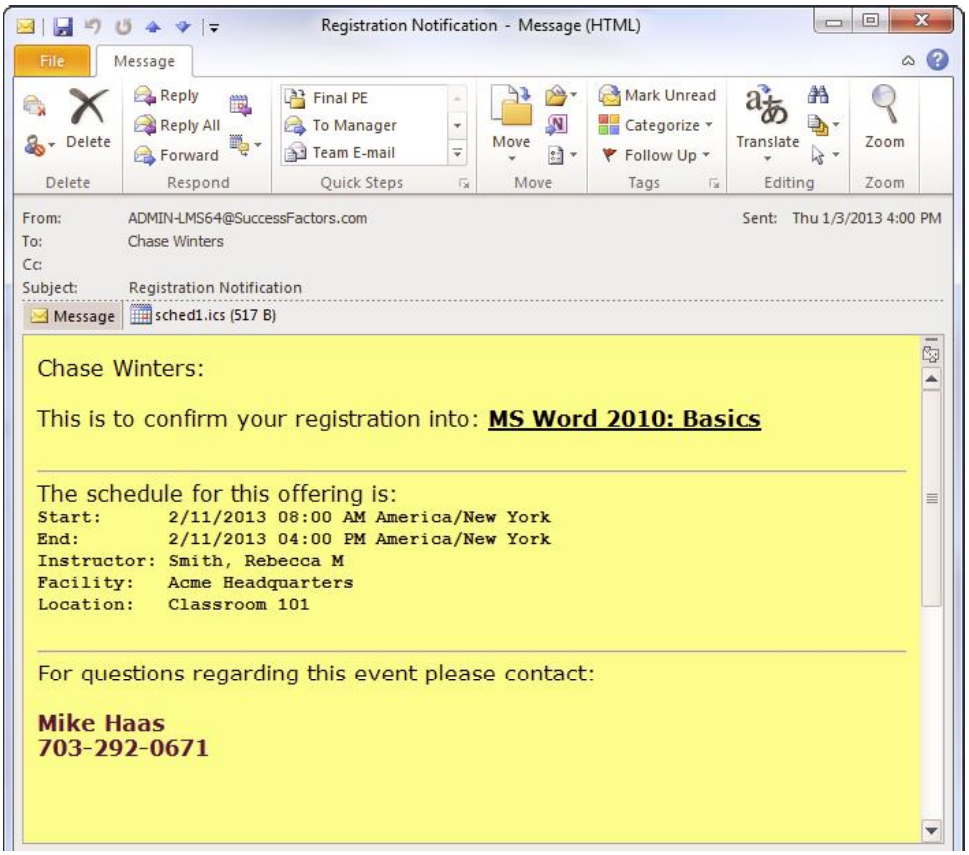
Sample Output (User Registration Notification):



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Lab 5: Generating and Adding Direct Link to Email HTML

Please note, the bold text is what was added to HTML from Lab 4.

```
<html>
<LOOP>
<font size="3" face="verdana">
<body bgcolor="#00CCCC">
<label key="notification.Enrollment.MessageText1"/><&ROLLUP_MESG>
<b><u><&ROLLUP_STUD_NAME></u></b><p></font>
</LOOP>

<body bgcolor="#FFFF99">
<font size="3" face="verdana">
<&STUD-FIRST> <&STUD-LAST>:<p>
This is to confirm your registration into: <b><u><&SCHD-
DESC></u></b><br><hr>
The schedule for this offering is:<p>
<pre><b><&SEG-GRID></b></pre><hr>
For questions regarding this event please contact:<P></font>
<font color="#660033" size="3" face="verdana">
<b><&SCHD-CONTACT><br>
<&SCHD-CONTACT-PHONE></b></font><hr>
<font size="2" face="verdana"><a href="INSERT DIRECT LINK
HERE">Take me to my Home Page</a>
</html>
```

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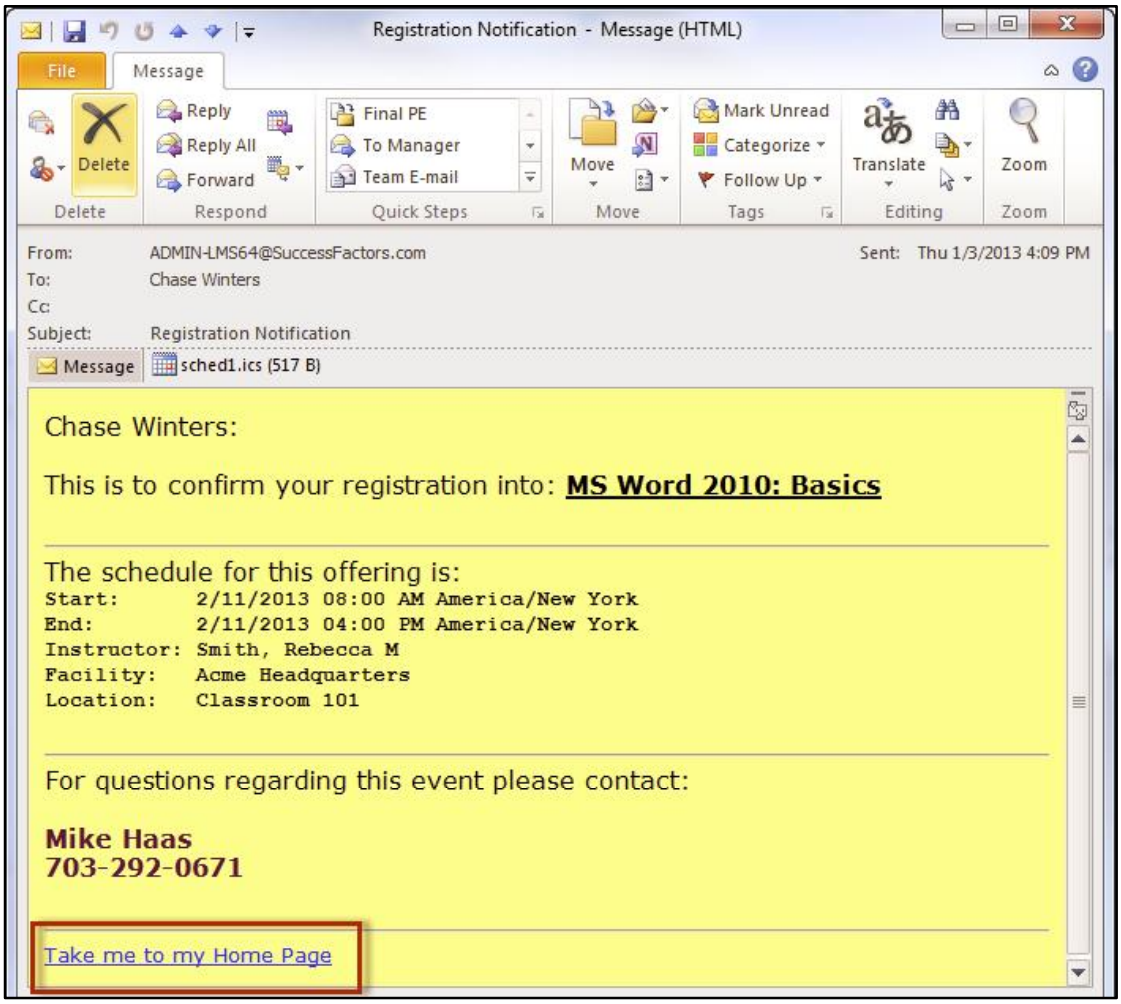
Sample Output (User Registration Notification):



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Appendix E: Sample HTML for Notifications

To see the code, copy the .html file to your desktop, right-click on the icon, select **Open** with and choose **Notepad**.

Registration Notification	Enroll-Adv-2.htm
Learning Expiration Notification	LearningExpiration.html
Learning Plan Notification (User)	LearningPlanChangesEmp.html
Learning Plan Notification (Supervisor)	LearningPlanChangesSup.html

Note: If you plan on using images <img>in your html notification templates there are potential security issues to be aware of (i.e., cross scripting). The SuccessFactors team discourages the use of images in notification templates. By default, the LMS is shipped with the ability to display images in notification turned off. If you desire images, then navigate to **System Admin > Configuration > System Configuration > Web Security**. You will need to change the secRules.imgtag.enabled setting from true to false (see screen shot on the next page).

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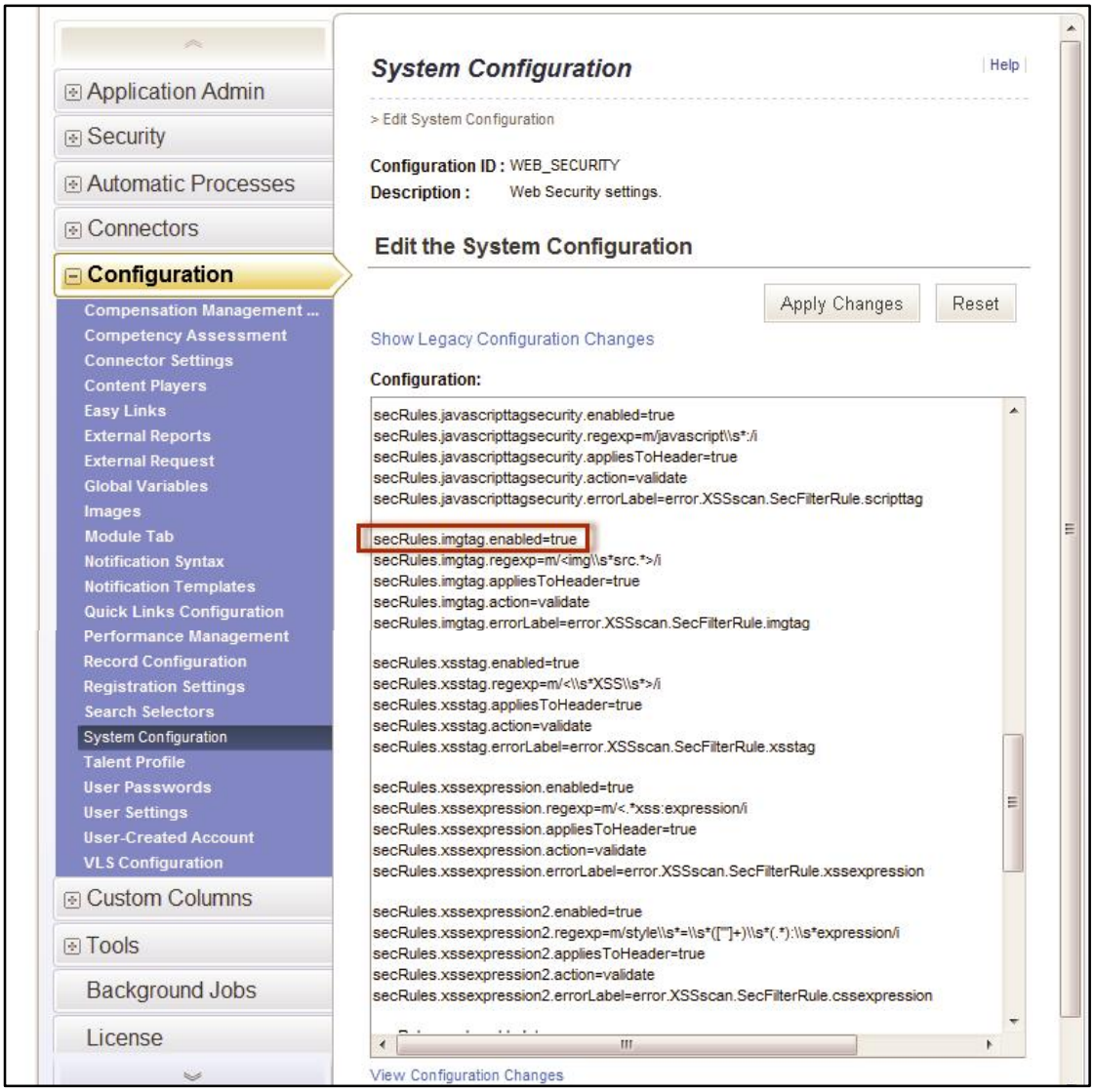

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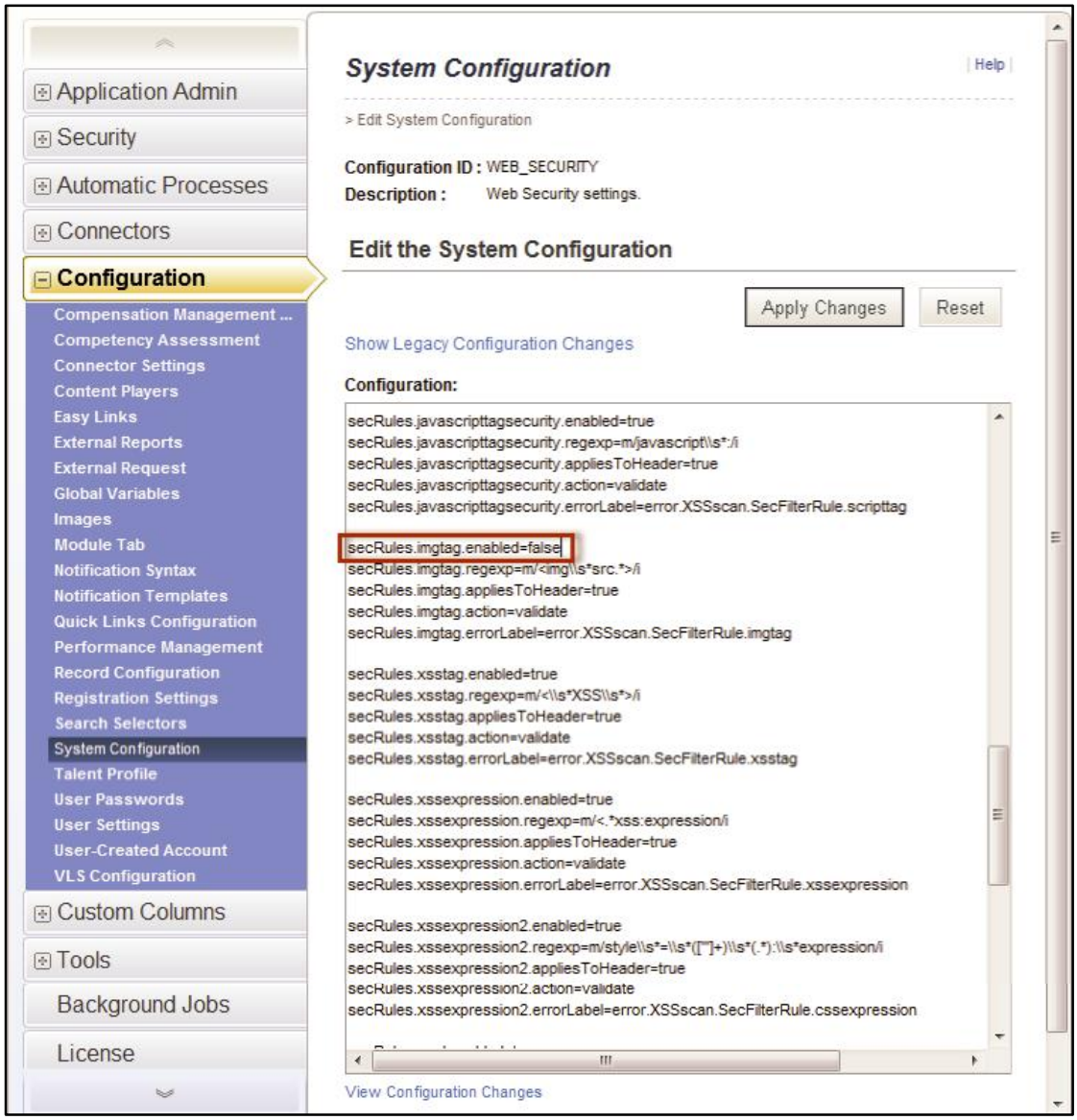

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Appendix F: SuccessFactors Learning Email Template List

Template ID	Template Description
AlternateSubordinateNotification	Assignment to Alternate Supervisor Notification E-mail Template
AlternateSupervisorNotification	Alternate Supervisor Assignment of Employees Rollup Notification E-mail Template
ApmAdminAssessmentReminder	Apm Admin Assessment Reminder
ApmAttachmentQuotaWatch	Attachment Quota Watch Notification
ApmCancelGeneratedScheduledOfferings	APM Cancel Generated ScheduledOfferings
ApmComponentRequest	APM Item Request Notification Email Template
ApmCouponExpiry	APM Coupon Expiration Notification Email Template
ApmExternalAssessmentReminder	Apm External Assessment Reminder
ApmInitiativeEmployeeNotification	Apm Initiative Employee Notification
ApmInitiativeOwnerNotification	Apm Initiative Owner Notification
ApmInitiativeRequiredReminder	Apm Initiative Required Reminder
ApmInstanceDelivery	APM Offering Delivery Notification Email Template
ApmLearnerAssessmentReminder	Apm Learner Assessment Reminder

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Template ID	Template Description
ApmPurchaseOrderLowBalance	APM Purchase Order Low Balance Email Template
ApmQualificationCleanup	APM Curriculum Clean Up Notification Email Template
ApmResetOnlineComponents	APM Reset Online Items Notification Email Template
ApmReviewCouldNotStartContactError	Review Start failed Error for contact Notification
ApmReviewInitiationContactError	Review Initiation Contact Errors Notification
ApmReviewInitiationSummary	Review Initiation APM Summary Notification
ApmStudentLearningPlanNotification	Notify Learner of Learning Plan changes
ApmSubscriptionExpiry	APM Subscription Expiration Notification Email Template
ApmSupervisorLearningPlanNotification	Notify Supervisor of Learning Plan changes
ApmSupervisorReviewIncompleteAssessment	Apm Supervisor Review Incomplete Assessment
ApmSynchronizeStudentChangesAssignmentProfile	APM Assignment Profile Synchronization
ApmTrainingExpiration	APM Learning Expiration Notification Email Template
ApmTrainingOverdue	APM Learning Overdue Notification Email Template
ApmUpdateCatalogPrice	APM Update Catalog Price Email Template
ApmVlsAttendanceProcessing	APM VLS Attendance Processing Notification Email Template
ApmWaitlistRequest	APM Waitlist to Request List Notification Email Template

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Template ID	Template Description
ApprovalProcessApprovalProgressed	Notify learner of progress in approval status
ApprovalProcessApprovalRequired	Notify approver of action required
ApprovalProcessApprovalWithdrawn	Notify Learner of withdrawn request
ApprovalProcessInitialRequest	Confirmation of Learner request submission
ApprovalProcessRequestApproved	Notify Learner of approved request
ApprovalProcessRequestDenied	Notify Learner of denied request
ApprovalProcessRequestExpired	Notify Learner of expired request
AssessmentProcessAdministrator	Assessment Process Administrator
AssessmentProcessAssessorApprover	Assessment Process Notification to Assessor Approvers
AssessmentProcessAssessorRemoved	Assessment Process Notification to Assessors upon Removal
AssessmentProcessAssessorsRejected	Assessment Process Notification to Nominators upon Assessor Rejection
AssessmentProcessCancellationAssessor	Assessment Process Cancellation Notification to assessor
AssessmentProcessCancellationAssessorApprover	Assessment Process Cancellation Notification to assessor approver
AssessmentProcessCancellationNominator	Assessment Process Cancellation Notification to nominator
AssessmentProcessCancellationReviewer	Assessment Process Cancellation Notification to assessment reviewer
AssessmentProcessExternalAssessor	Assessment Process Notification to Assessors upon Assessor Approval
AssessmentProcessInternalAssessor	Assessment Process Notification to Assessors upon Assessor Approval
AssessmentProcessNominatorRescheduled	Assessment Process Start Rescheduled

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Template ID	Template Description
	Notification to Nominators
AssessmentProcessNominatorStart	Assessment Process Start Notification to Nominators
AssessmentProcessReviewer	Assessment Process Notification to Reviewer upon assessment completion
BackgroundJobNotification	Email Notification Template for background jobs
BackgroundReportJobNotification	Email Notification Template for Background Report Jobs
BusinessProcessApprovalProgressed	Notify learner of progress in approval status
BusinessProcessApprovalRequired	Notify approver of action required
BusinessProcessInitialRequest	Confirmation of Learner request submission
BusinessProcessRequestApproved	Notify Learner of approved request
BusinessProcessRequestDenied	Notify Learner of denied request
CERTIFICATE_OF_COMPLETION	Email Notification for Sending Certificate of Completion
CareerPlannerTargetJobPositionChange	Career Planner Target Job Change Notification
ComponentAssignment	Item Assignment Notification Email Template
DelegateeEmail	Delegatee Email Notification
DelegationAssignment	Delegation Assignment Notification
ESigPinExpiredNotification	Notification for Expired ESIG PIN
ESigPinFailedNotification	Notification for ESIG PIN Failure
EnrollmentSlotCancellation	Registration Slot Cancellation Notification Email Template

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Template ID	Template Description
EnrollmentSlotChangeConfirmation	Registration Slot Change Confirmation Notification Email Template
EnrollmentSlotConfirmation	Registration Slot Confirmation Notification Email Template
ExpiredCatalogItemsNotification	Email Notification Template for Expiration of catalog items
ExternalLearningRequestApprovalRequired	Notify approver of action required regarding an external training request
ExternalLearningRequestVerificationRequired	Notify approver of action required regarding a verification of external training request
ExternalVerificationReminder	External Verification Reminder
FollowupEvaluationAssignmentNotification	Questionnaire Survey Assignment Notification RollUp Email Template
IDPApproval	Development Plan Approved
IDPApprovalCancelledBySystem	Plan Approval Cancelled by System
IDPApprovalRequest	Development Plan Review Request
IDPExpiration	Email Notification Template IDP Expiration
IDPExpirationNotification	Plan Expiration Notification
IDPInactiveApproval	Development Plan Inactive Approval
IDPNote	Note Notification
IDPReject	Development Plan Rejected
ItemEvaluationAssignmentNotification	Questionnaire Survey Assignment Notification Email Template
JamGroupInvitation	Jam Group Invitation Notification Email Template
PasswordNotification	Password Notification Email Template

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Template ID	Template Description
PreExpirationNotificationForCatalogItems	Email Notification Template for Pre Expiration of catalog items
PwsComponentAssignment	PWS Item Assignment Notification Email Template
ReassignStudentComponentNotification	Reassign student component notification
RecurringReportJobNotification	Email Notification Template for Recurring Report Jobs
ReviewProcessReviewApproval	Review Notification for Approver
ReviewProcessReviewApprovalDenied	Review Notification Denied by Approver
ReviewProcessReviewCreatedEmployee	Review Creation Notification for Employee
ReviewProcessReviewCreatedSupervisor	Review Creation Notification for Supervisor
ReviewProcessReviewDeadlinePassed	Review Deadline Passed Notification
ReviewProcessReviewFeedbackRequired	Review Submission Notification for Feedback Rater
ReviewProcessReviewNeeded	Review Needed Notification
ReviewProcessReviewPublished	Review Published Notification
ReviewProcessReviewReminder	Review Reminder Notification
ReviewProcessReviewSubmittedEmployee	Review Submission Notification for Employee
ReviewProcessReviewSubmittedSupervisor	Review Submission Notification for Supervisor
ReviewProcessReviewUnpublishedEmployee	Review Unpublished Notification for Employee
ReviewProcessReviewUnpublishedSupervisor	Review Unpublished Notification for Supervisor
SELF_REGISTRATION_ADMIN	Self Registration Admin Notification Template

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Template ID	Template Description
SELF_REGISTRATION_STUDENT	Self Registration Learner Notification Template
SystemEnrollmentNotification	System Registration Notification
SystemPendingEnrollmentNotification	System Pending Registration Notification
SystemScheduleCancellationNotification	System Scheduled Offering Cancellation Notification
SystemUnenrollmentNotification	System Unregistration Notification
SystemWaitlistNotification	System Waitlist Notification
SystemWaitlistRemovalNotification	System Waitlist Removal Notification
TrainingNeedsMakeAssignmentNotificationToSupervisor	Supervisor Receives Notification to Make Assignments Email Template
TrainingNeedsModifiedBySupervisor	Training Needs Modified by Supervisor Notification Email Template
TrainingNeedsRejectedByOrgOwner	Training Needs Rejected by Org Owner Notification Email Template
TrainingNeedsRejectedByOrgOwnerForSupervisor	Training Needs Rejected by Org Owner for Supervisor Notification Email Template
TrainingNeedsRejectedBySupervisor	Training Needs Rejected by Supervisor Notification Email Template
TrainingNeedsRequested	Training Needs Requested Notification Email Template
UserHistoryPurge	Email Notification Template for User History Purge APM
UserTalentProfileExpired	User Talent Profile Expiration Template
VLE_ENROLLMENT	VLE Registration Notification Email Template
VLE_EVENT_CREATION	VLE Event Creation Notification Email Template
VLE_EVENT_DELETION	VLE Event Deletion Notification Email

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Template ID	Template Description
	Template
VLE_EVENT_UPDATE	VLE Event Update Notification Email Template
VLE_EVENT_UPDATE_STUDENTS	VLE Event Update Learner Notification Email Template
VLE_UNENROLLMENT	VLE Unregistration Notification Email Template

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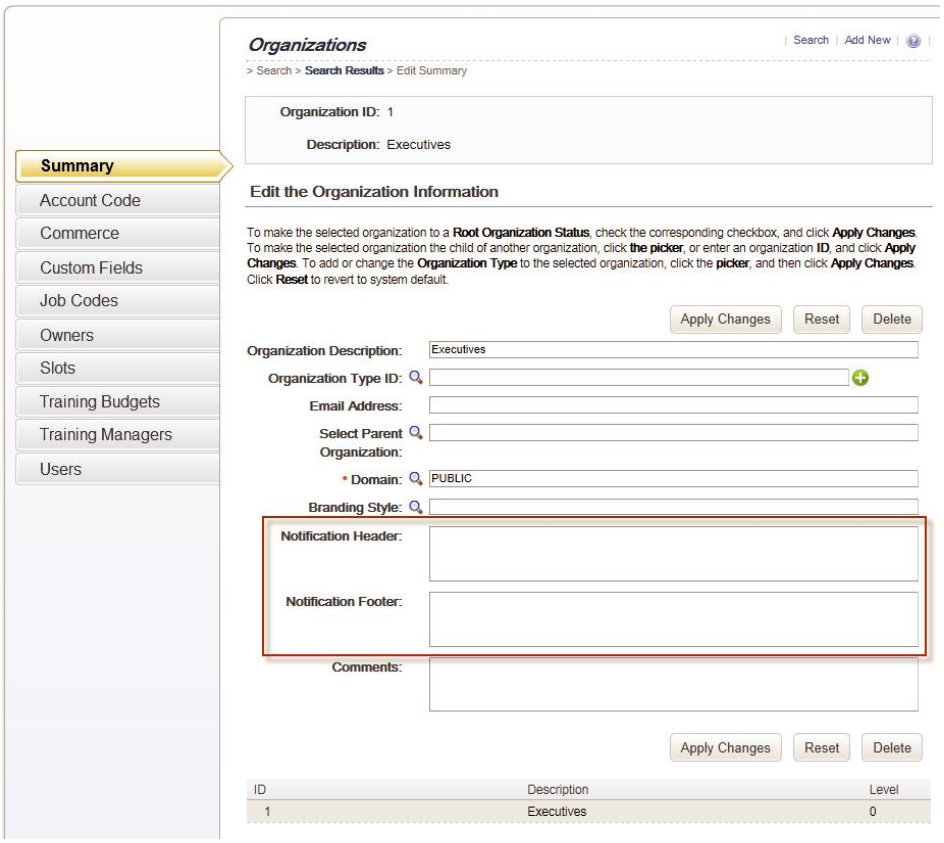
Appendix G: Organization Headers and Footers

If enabled globally, email notifications may include an organization's header and/or footer. (System Admin > Configuration > System Configuration > LMS_ADMIN: support.enableNotificationHeaderFooter=**true)**

- Admins may define a different header and footer with text and HTML if desired on the organization record.
- Users will receive the same notification email but with the distinct header and footer messages associated to their organization.
- The top organization record in the tree may be updated, and the update will apply to all sub-organizations



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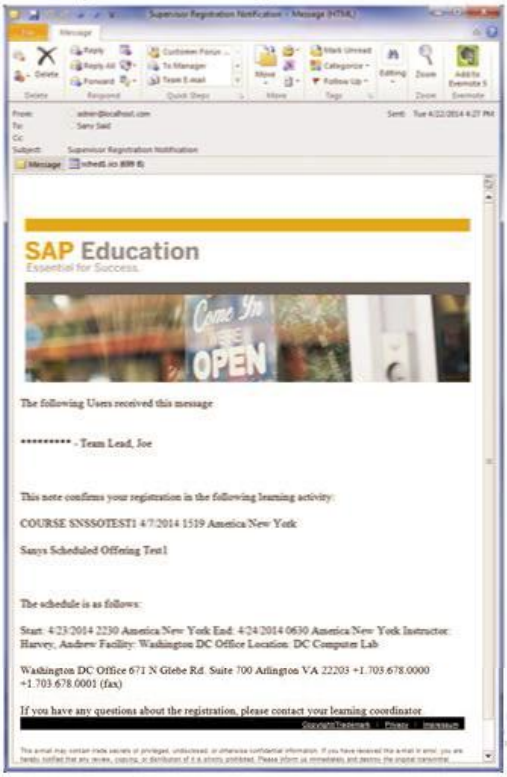
Examples:

User from Org "A" Notification

Supervisor from Org "B" Notification



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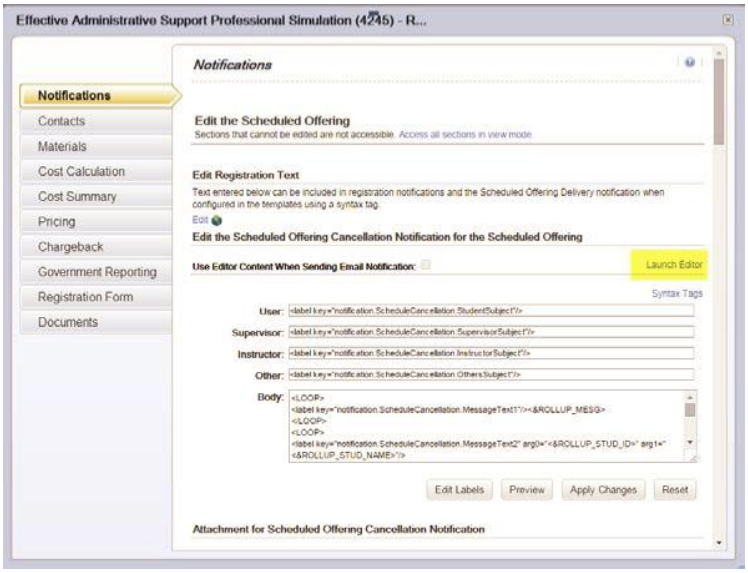
Appendix H: Notification Template Editor

There is an alternative method of editing notifications using a rich text editor. This method lets you create localized versions of each template (one for each language) so the use of labels may not be necessary.

In order to use this editor, a global setting must be enabled in System Admin -> Configuration -> Global Variables -> Use Editor Content When Sending Email Notifications.

Once enabled globally, you may launch the editor from within the notification template you are modifying.



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The template contains different parts such as the locale, subject line, body, and syntax tags (Figure 21).

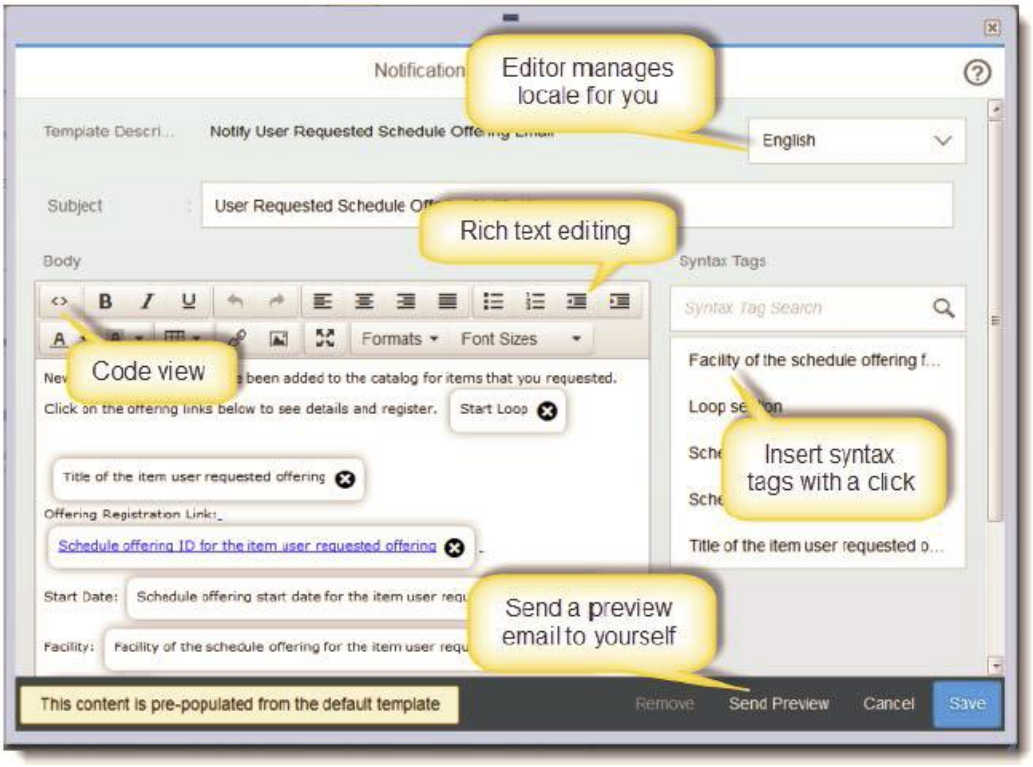

Figure 21. Parts of Template

Images and links may be added to this template and text may be formatted with a variety of options. When you have finished editing or want to test the notification, you may send a preview to your admin email address.

Item Specific Text

For certain syntax ids, it is possible to include the <CPNT_INSTRUCTIONS/> syntax tag that pulls item specific text that may be unique for each item. These syntax IDs are:

- APM_STUDENT_LEARNING_PLAN_NOTIFICATION
- APM_SUPERVISOR_LEARNING_PLAN_NOTIFICATION
- APM_TRAINING_EXPIRATION
- APM_TRAINING_OVERDUE

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The text is entered on the Notification tab of the item by clicking the **Edit** link (Figure 22).

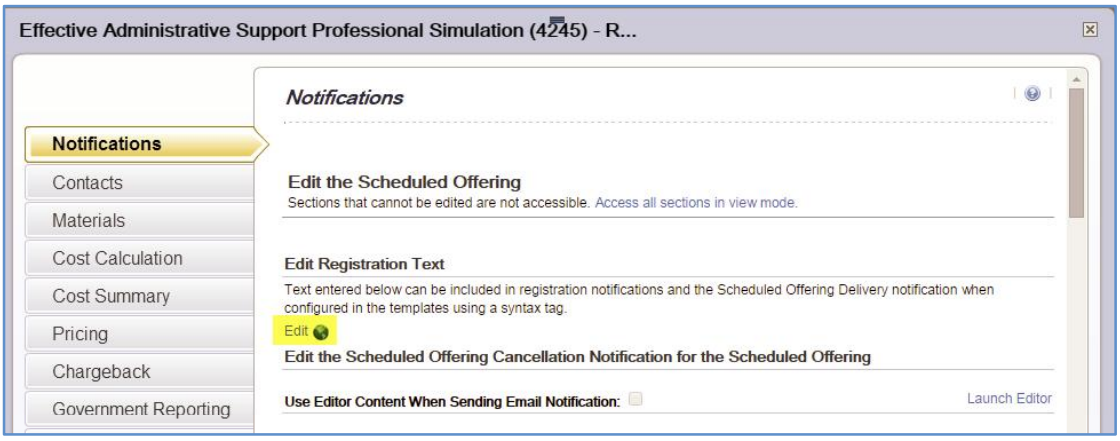

Figure 22. Notifications Edit Link

Text may be entered for each of the supported locales (Figure 23).

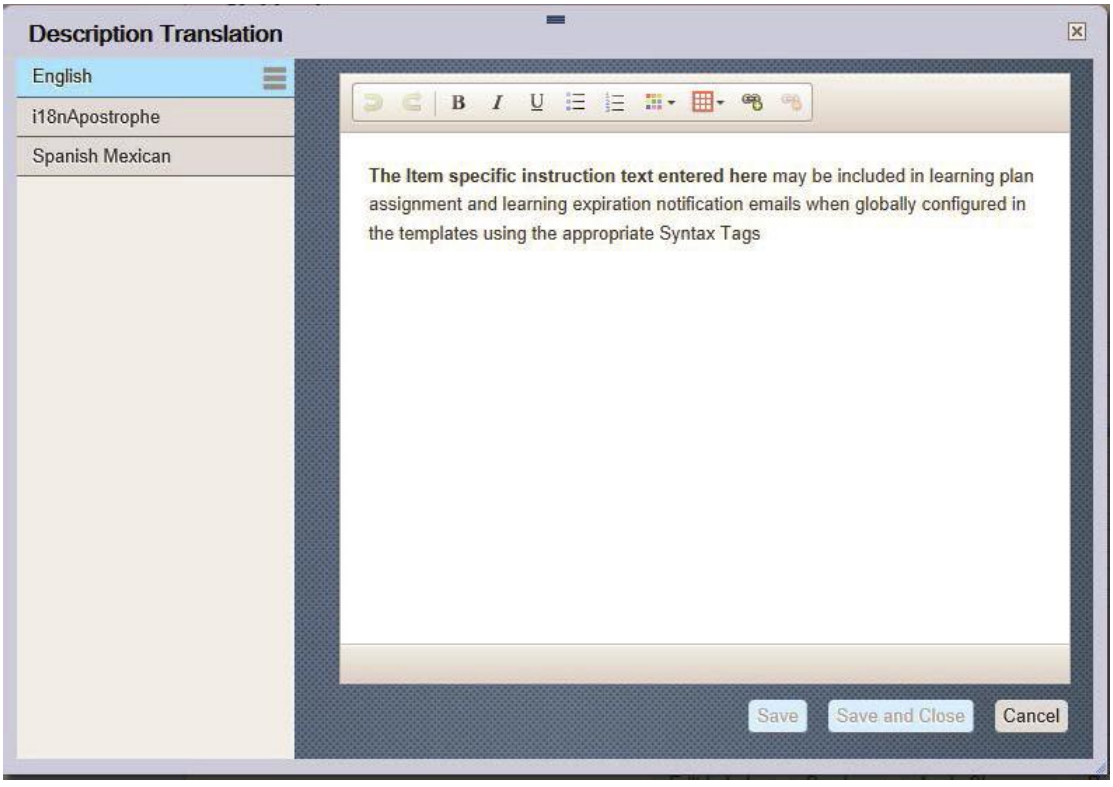

Figure 23. Description Translation Screen

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Similarly, there is a syntax tag for <SCHED_INSTRUCTIONS/> which will pull text from the scheduled offering's notifications tab and may be used in these syntax IDs:

- APM_INSTANCE_DELIVERY
- ENROLLMENT

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