Modifying Learning Notification Templates
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What's New in Modifying Learning System Generated Notifications

Track what we added to the content that helps you modify Learning system generated notifications.

Q2 2018 - Current

No changes

Q1 2018

The following table summarizes changes to this guide for the Q1 2018 release

<table>
<thead>
<tr>
<th>What’s New</th>
<th>Description</th>
<th>More Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Searching supported tags for a notification template</td>
<td>You can view the list of supported tags for a particular notification template.</td>
<td>Searching the list of supported tags for any SAP SuccessFactors Learning Notifications Template [page 35]</td>
</tr>
</tbody>
</table>

Modifying Learning Notification Templates
What’s New in Modifying Learning System Generated Notifications
1 Process for Enabling SAP SuccessFactors Learning Email Messages

To enable email messages in SAP SuccessFactors Learning, you configure the basics, you configure how email invitations work, and you configure email archiving.

Basic Configuration for Email Messages

Basic configuration for email messages includes turn on the system, making some behavioral choices, and setting up automatic processes that manage the notifications.

Learning Invitation Configuration for Email Messages

Email invitation configuration includes how you want SAP SuccessFactors Learning to set calendar appointments for users for classes.

Archive for Email Messages

SAP SuccessFactors Learning offers you choices for archiving email that it sends. Choose an archiving option that matches your company policy.

1.1 Enabling Email Notifications in SAP SuccessFactors Learning

Enable email notifications in SAP SuccessFactors Learning so that Learning can send email messages about training and system information.

Prerequisites

We rely on a separate (Simple Mail Transfer Protocol) SMTP server to send email. The configuration of the SMTP server is done at the backend. You can also use the server we provide. If you plan to use your own, your configuration is more complex. You must, however, have an SMTP server identified before you enable the email notifications.
**Context**

You typically enable notifications during implementation and when you start a new instance.

**Procedure**

1. Go to SAP SuccessFactors Learning Administration and then go to [System Administration ➔ Configuration ➔ Global Application Settings ➔ Mail](#).

2. Select **Enabled** in **Enable email**.

   **i Note**
   
The SMTP server settings are handled at the backend.

3. Type the email addresses that administrators see as the sender in **Admin Email Notification** and that learners see as the sender in **User Email Notification**.

   For example, you can type `noreply@<your company domain>`.

4. In **Email Frequency**, type **5**.

   **Email Frequency** is the number of minutes that you want the application server to wait before it contacts the SMTP server to send notification messages.

5. In **Send email notification from** select **Select from list** and then type a comma-delimited list of email addresses.

   **Select from list** allows administrators to choose an address from one or more addresses that you provide and control. When administrators create ad hoc notifications, Learning adds the email address of the administrator who is attempting to send the notification to the top of this list automatically, but they can select any one of the emails addresses you provide.

   ○ **Free-form** allows administrators to type any email address with valid syntax. It doesn’t do a legal check of the text that an administrator types.

   ○ **Admin** forces administrators to use their own email addresses.

6. Choose **Apply Changes**.

**Next Steps**

Configure email invitations and email archiving.
1.2 Sending Virtual Learning Email Notifications from Administrator's Email Instead of Instructors

Send virtual learning email notifications from administrator's email instead of instructors to make virtual learning email notifications behave like all other email notifications and to hide instructor email addresses for privacy.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration > Configuration > Global Application Settings > Mail.
2. Click Mail.
3. Select Use Admin's email address for VLE email notifications.
4. Click Apply Changes.

1.3 Overriding Individual Course or Class Calendar Attachments with Global Templates

Override individual course or class templates if you want SAP SuccessFactors Learning to ignore any calendar attachments in the course or class template and send the global calendar attachment instead.

Context

If you override individual course or class messages with global templates, then the system uses the global ICS attachment when it sends the notification: the legacy behavior before Q1 2017. If you do not override individual course or class messages with global templates, then each customized course or class notification gets its own ICS copy: the new standard behavior. If you do not override, then changes to the global ICS attachment leave individualized notifications unaffected.

Note

Overriding individual course or class calendar attachments with global templates is not best practice.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration > Configuration > Global Application Settings > Mail.
2. Select *Always use VCAL message from the Global templates.*

Changes to the global ICS attachment change individualized notifications without warning.
3. Click *Apply Changes.*

### 1.4 Periodic SAP SuccessFactors Learning Reminder Email Notifications

SAP SuccessFactors Learning has automatic processes that periodically send reminder email notifications to users.

In most cases, SAP SuccessFactors Learning sends email notifications because of an event. For example, it sends notifications when users are enrolled in training. But SAP SuccessFactors Learning also uses automatic processes to send periodic notifications to users to remind them to do something, to send a newsletter, and so on. You configure the periodic reminders as automatic processes so that you can control how often they send their messages.

#### 1.4.1 Controlling When Learners are Notified of Changes to their Learning Assignments

If you have a special case that requires special rules, change when users are notified of their learning assignments.

**Context**

Most customers can use the default settings for learner email notifications to changes to their learning assignments. We recommend the defaults. If, however, you have a special case that requires more restrictive notification rules, you can adjust the email notifications that SAP SuccessFactors Learning sends when courses are added and removed from learning assignments.

**Procedure**

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration → Application Administration → User Settings.*
2. In the page, find *Learning Plan Email Notification Settings.*

**i Note**

Learning Plan is the old phrase for what is now *Learning Assignments.*
3. Change how learners are notified when their assignments change.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify user when item added to their learning plan</td>
<td>If you select Notify user when item added to their learning plan, SAP SuccessFactors notifies learners when courses are added to their learning assignments.</td>
</tr>
<tr>
<td>Notify user when item modified in their learning plan</td>
<td>If you select Notify user when item modified in their learning plan, SAP SuccessFactors notifies learners when their learning assignments are modified.</td>
</tr>
<tr>
<td>Notify user when item removed from their learning plan</td>
<td>If you select Notify user when item removed from their learning plan, SAP SuccessFactors notifies learners when courses are removed from their learning assignments.</td>
</tr>
<tr>
<td>Allow user to modify learning plan notification settings</td>
<td>If you select Allow user to modify learning plan notification settings, learners can control their own email notifications. They can decide to be notified when courses are added, changed, or removed from their assignments. The values of the other learning email notifications become the default values. Learners can override your settings. For example, if you select Notify user when item removed from their learning plan and you select Allow user to modify learning plan notification settings, then by default, learners are notified when courses are removed but learners can go into their options and clear it so that they do not receive email notifications for removed courses.</td>
</tr>
</tbody>
</table>

4. Change how managers are notified of their employees’ assignments.

**i Note**

For learners themselves, you typically want them to get their email notifications because it’s about their own assignments. Typically, you also want managers to get email notifications from their employees, but it’s slightly more likely that you want to disable the email notifications. You might disable the email notifications if you are in an organization that doesn’t allow managers to assign or manage employee assignments. By disabling the email notifications, employee data is blocked from the manager.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify Manager when user successfully completes an item</td>
<td>If you select Notify Manager when user successfully completes an item, notifies managers when a course is successfully completed by one of their employees.</td>
</tr>
<tr>
<td>Notify Manager when user unsuccessfully completes an item</td>
<td>If you select Notify Manager when user unsuccessfully completes an item, SAP SuccessFactors notifies managers when a course is unsuccessfully completed by one of their employees. This means that the user didn’t meet the requirements in some way (didn’t attend the entire course, didn’t pass an exam, and so on).</td>
</tr>
</tbody>
</table>
5. Click Propagate Learning Plan Email Notification Changes and then follow the process to run the propagation job.

Next Steps

Schedule the Learning Plan Email Notification automatic process. Go to System Administration >> Automatic Processes >> Learning Plan Email Notification.

Related Information

Creating Automatic Notifications to Learners When Course Assignments Change [page 11]

1.4.2 Creating Automatic Notifications to Learners When Course Assignments Change

Create automatic notifications to learners when course assignments change so that when learners’ course assignments change, they receive a notification that they have a new assignment and their supervisors stay current on their assignments.

Prerequisites

The bulk of the configuration for automatic notifications when learners’ course assignments change occurs in System Administration >> Application Administration >> User Settings >> Learning Plan Email Notification Settings. Before you create the automatic notifications, configure how you want the notifications to behave.

If you want to customize the message that SAP SuccessFactors Learning sends for external verification reminders, change the ApmStudentLearningPlanNotification template for learners and the ApmSupervisorLearningPlanNotification template for supervisors.

Context

The learning plan notification process sends notifications to learners when a course from the learner’s learning plan is added, removed, or modified. It sends notifications to supervisors when a learning event is recorded for one of their direct reports. SAP SuccessFactors Learning notifies supervisors even if the item isn’t on the learner’s learning plan.
Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration > Automatic Processes > Learning Plan Email Notification.
2. In Schedule, set the period that the automatic process runs to send the reminder.
3. Click Apply Changes.

Related Information

Controlling When Learners are Notified of Changes to their Learning Assignments [page 9]
Creating Prompt for Users to Complete Courses that are Near the Due Date [page 12]

1.4.3 Creating Prompt for Users to Complete Courses that are Near the Due Date

Create an automatic reminder for users when they need to take action on their course assignments so that SAP SuccessFactors Learning prompts them to complete their assignments when they near their due date.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to System Administration > Automatic Processes > Learning Expiration Email Notification.
2. In Schedule, select Schedule This Process and then set a schedule for it to run.
3. In Email Recipients, decide who should receive the learning expiration notification.

<table>
<thead>
<tr>
<th>When you select this...</th>
<th>...The following recipients get the notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>The user whose learning is expiring within the threshold of days. This is the user responsible for completing the expiring learning content.</td>
</tr>
<tr>
<td>Manager</td>
<td>The supervisors of the user whose training is expiring.</td>
</tr>
</tbody>
</table>

4. To enable a separate email template for overdue items, select SuccessFactors Overdue Learning Notification.

This setting can be confusing because it looks like you can clear SuccessFactors Overdue Learning Email Notification to disable overdue learning notifications. But that isn’t how it works. Instead, when you select it, it simply forces the Learning Expiration process to use ApmTrainingOverdue for overdue assignments and ApmTrainingExpiration soon-to-be overdue assignments. If you clear it, then both overdue and soon-to-be-overdue assignments use the ApmTrainingExpiration template.

5. In Threshold, type the number of days into the future that the process should check for a next action date (for curricula) or a required date (for learning items).
For example, if you type 30 in Threshold, then when the Learning Expiration automatic process next executes, it looks 30 days into the future. If it finds any users with courses due in the next 30 days, it sends the notification.

6. In Reminder Period, type the number of days that the process should wait to send a reminder. For example, if you type 30 in Threshold and 7 in Reminder Period, then a user receives up to four notifications (one message every 7 days for 30 days before the required or next action date) that remind them to complete the item. That is, if you execute the automatic process every day, then the user receives four reminders; if you run the process every two weeks, then the user receives two reminders.

### 1.4.4 Creating an Automatic Reminder for Learners to Take Action on External Verification

Create an automatic reminder for users to take action on external verification so that learners remember to submit their external learning events to their supervisors for verification to get credit for their completion.

#### Prerequisites

If you want to customize the message that SAP SuccessFactors Learning sends for external verification reminders, change the ExternalVerificationReminder template.

#### Context

This reminder applies if you’re using the external event system, which is often known in U.S. Federal Government customers as the SF-182 process. The U.S. Federal Government has a strict system for requesting, completing, and getting credit for external events.

#### Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration ➔ Automatic Processes ➔ External Learning Verification Approval Reminder ➔.
2. In Schedule, set the period that the automatic process runs to send the reminder.
3. In Maximum Notifications, set the times that a user should be reminded about an external event before the process stops notifying them.

   If you set Maximum Notifications to 3, then the process sends three reminders to a user about a particular event and then stops sending reminders.

4. In Reminder Period, type the number of days that the process should wait before sending another reminder.

   If you set Reminder Period to 5, the notification process waits five days before sending a follow-up reminder to the same user about the same external event.
5. Click *Apply Changes*.

**Results**

On the schedule you set, the external verification reminder automatic process sends out email notifications if it finds a user with an external learning event that has a completion date in the past but the user hasn’t yet requested for the supervisor to verify the learning event.

**1.4.5 Creating an Automatic Reminder for Courses in Jam Groups**

Create an automatic process to send a notification when an administrator sets one of the available invitations while associating an item with a Jam group.

**Prerequisites**

If you want to customize the message that SAP SuccessFactors Learning sends for external verification reminders, change the `JamGroupInvitation` template.

**Context**

The Item Jam group notification automatic process sends notifications when an administrator sets one of the available invitation settings while associating an item with a Jam group (Learning Activities ➔ Items ➔ Jam Groups).

**Procedure**

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration ➔ Automatic Processes ➔ Send Jam Groups Invitation.
2. In Schedule, set the period that the automatic process runs to send the reminder.
3. Click *Apply Changes*. 
1.4.6 Creating an Automatic Reminder for Users to Attend Classes

The Class Delivery process sends notifications to remind users that they’re registered for an upcoming class.

Prerequisites

If you want to customize the message that SAP SuccessFactors Learning sends for external verification reminders, change the automaticprocessInstanceDelivery template.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration Automatic Processes Upcoming Class Reminder Email Notification.
2. Schedule the automatic process using the fields in the Schedule area.
3. In Threshold, type the number of days in advance of the class that you want to remind users.
   Type a threshold that is higher than the scheduled interval of the automatic process.
   If you type 7 in Threshold but run the automatic process every month, users don’t receive their email a week before their training (as you intended with the threshold). Instead, they receive reminders monthly, when the automatic process runs.
4. In Email Recipients, select who should receive the notification.

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users</td>
<td>You almost always select user if you set up this process because its purpose is to tell users (learners) that they have upcoming classes.</td>
</tr>
<tr>
<td>Supervisors</td>
<td>Consider including or excluding supervisors depending on how involved they are with their employees’ training requirements. If your managers are involved in their teams’ training, select it.</td>
</tr>
</tbody>
</table>
5. Click Apply Changes.

Example

You want users to receive reminders about upcoming training seven days before the start of the class and your classes can start on any day of the week. Furthermore, your supervisors actively oversee their employees’ training. In this case, we recommend:

- Set Threshold to seven days so that users receive an email a week before training.
- Set the schedule to Daily so that the automatic process runs on Wednesday to pick up classes that begin on Wednesday and runs on Thursday pick up ones that begin on Thursday, and so on.
Set Email Recipients to User (employee) and Supervisor so that the supervisor gets a copy of the reminder and can talk with the employee about attending the class.

1.4.7 Creating an Automatic Reminder for Expiring Free-of-Charge Subscriptions to SAP SuccessFactors Learning

Create an automatic reminder for expiring subscriptions if you use Learning commerce features and paid subscriptions to Learning.

**Context**

Organizations can pay a subscription fee so that their users can access learning content for some period of time. When the subscription nears its end, the process notifies subscription owners that their subscription is nearing its end.

**Procedure**

1. Go to SAP SuccessFactors Learning Administration, and then go to System Admin ➤ Automatic Processes ➤ Free-of-Charge Subscription Expiration Email Notification
2. Schedule the automatic process using the fields in the Schedule area.
3. In Send email notification to Free-of-Charge Subscription Owner prior to end date, set the time that the subscription owners should be notified before the subscription ends.
   
   If you set this to one month, then the process notifies subscription owners that their subscription end one month before the end of the subscription.
4. Click Apply Changes.
1.4.8 Creating an Automatic Notification for Learners who Requested a Class

Create an automatic notification for learners who requested a class so that when administrators add a scheduled offering for a course that users have requested, the users receive notification that their request was met.

Prerequisites

This automatic notification is part of a larger system that allows users to create requests. To send notifications with this process, enable the request schedule feature, add contact info for learning items, add minimum registration to learning items, and enable the request processing jobs.

Context

When users can’t find a scheduled offering that they need, they can request it. A request tells learning administrators that they have a user who needs a class, but it isn’t scheduled for a time that the user can attend. The administrators can look at the requests and decide to add a class.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration ➤ Automatic Processes ➤ Requested Class Availability Email Notification ➤.
2. Schedule the automatic process using the fields in the Schedule area.
3. Click Apply Changes.

Results

When the automatic process runs, it looks for:

- New learning offerings that have been added to the catalogs of users who have made requests.
- The start date of the offerings that have been added: are they before the need by date of the request. The need by date is the date that the user needs to take the course: it’s the user’s deadline. So, the automatic process looks to see if the offering helps users meet their deadline.
- The offerings are in the users’ geographic regions. Some companies do not use regions. If the user does not have a region, the automatic process skips this step. The automatic process looks for regions so that the offering is close to the user. Users submit requests because they do not have travel budget and so they need an offering that meets their deadline in their region.
When a user with a request has offerings that meet the criteria, the automatic process sends them an email. The email includes the course name (learning item title), it includes the details of the offering, and it provides a link to register for the offering.

1.4.9 Creating a Recommendations Email Newsletter

Create a recommendations email newsletter to email a list of recommended courses to users.

Prerequisites

Before you set up the recommendations newsletter, enable users to receive and make peer to peer recommendations.

Context

In SAP SuccessFactors Learning, users can make recommendations to their peers and administrators can make recommendations to users through assignment profiles. For example, if users finished a course and it was very helpful to them, they can recommend it to peers. The Recommendations Newsletter compiles the peer and administrator recommendations for a user, but does not make the recommendations.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration Automatic Processes Recommendations Newsletter.
2. Schedule the automatic process using the fields in the Schedule area.
3. In Email Notification Interval, type a number of days that the newsletter rests (does not go to users).
   
   The notification interval defines a time when a user won’t receive the recommendations newsletter. It is a "rest period" between notifications. You define it in days, so you can think of this as the "days between recommendations." Setting a good interval helps you avoid overexposing your users to recommendation emails.
   
   If you type 7, then users who have already received an email do not receive another one for seven days. After seven days, on the next run of the process, the user does receive an email.
4. Click Apply Changes.
1.4.10 Creating Automatic Account Reminders for User-Created Accounts

Create automatic account reminders for user-created accounts so that users who have requested accounts can receive the results of their requests.

Prerequisites

Create an approval process that users should follow when requesting a SAP SuccessFactors Learning account. Go to References > System Administration > Approval Process.

Configure an assignment profile to define the users who should be assigned the approval process. Go to Manage User Learning > Assignment Profiles.

Procedure

1. Go to System Administration > Automatic Processes > User-Created Account Approval Reminder.
2. Schedule the automatic process using the fields in the Schedule area.
3. In Maximum email notifications, set the maximum number of notifications for each request to be sent to an approver.
   If the number of notifications sent to an approver exceeds the maximum, the request is still active, but the system no longer sends messages. If you don’t provide a value, there’s no maximum: the approver receives reminders indefinitely.
4. In Reminder period, set the number of days that the system should wait before resending a reminder.
   Set a reminder period so that approvers don’t receive an email each time the process runs. You can set the process to run daily, for example, but set a reminder period of seven days. Although the system runs daily, approvers see a reminder once a week.
5. Click Apply Changes.

Example

If you schedule the process to run daily, set the maximum notifications to three and the reminder period is set to seven, then when the process runs, it looks for requests that are still unapproved after seven days and it sends a reminder to the approver. After it sends three reminders, it stops sending reminders.
1.4.11 Sending Periodic Digests of Enrollments to Learning Supervisors

Send periodic digests of enrollments to learning supervisors (including alternate supervisors) so that they aren’t overwhelmed with individual notifications but instead receive a digest of the individual notifications.

Prerequisites

Periodic digests for supervisors use the `ApmEmployeeEnrollmentDigest` notification template. Although you don’t need to customize the notification, if you do customize it, do so before configuring the process.

Context

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i Note
The Periodic digests are restricted to 500 entries to an email. This includes all registrations, including the ones that the supervisors themselves added.

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Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to `System Administration ➤ Automatic Processes ➤ Manager Email Notifications for Enrollment Digest`.
2. Schedule the automatic process using the fields in the `Schedule` area.
3. Click `Apply Changes`. 
1.5   **Enabling Custom Organization Email Notifications in SAP SuccessFactors Learning**

Enable customized headers and footers in SAP SuccessFactors Learning email notifications if you use organizations and you want to brand each organization's notifications differently.

**Procedure**

1. Go to SAP SuccessFactors Learning and then go to ► System Administration ► Configuration ► System Configuration ►.
2. Open LMS_ADMIN.
3. Find `enableNotificationHeaderFooter` and set it to `true`.
   When users are a part of an organization, they see the organization's header and footer, which you define in ► People ► Organizations ►.
4. Find `useOrgEmailAsFromForNotifications` and set it to `true`.
   When users are a part of an organization, they see the organization's email address as the sender of the email.
   You define the email in ► People ► Organizations ►.

**Next Steps**

Go to each organization in ► People ► Organizations ► and add the custom header and footer and verify that all organizations have an email address.

**Adding Custom Notification Information to SAP SuccessFactors Learning Organizations [page 22]**
Add custom notification information to SAP SuccessFactors Learning organizations so that users' notifications about their learning appear to come from the organization they recognize instead of the broader company.

**Inheritance in Customized Learning Organization Email Notifications [page 23]**
When you customize Learning organization email notifications, you can customize the highest organization record in the organization tree so that the update applies to all its sub-organizations.
1.5.1 Adding Custom Notification Information to SAP SuccessFactors Learning Organizations

Add custom notification information to SAP SuccessFactors Learning organizations so that users' notifications about their learning appear to come from the organization they recognize instead of the broader company.

Prerequisites

Enable custom organization email notifications in SAP SuccessFactors Learning.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to People Organizations.
2. Find and open the organization that you want to customize.
3. Go to Summary.
4. In From Email Address, type the email address that users of this organization should see as the sender when they receive Learning notifications.
5. In Notification Header and Notification Footer, add the header and the footer text that users should see in the message body when they receive email notifications and are members of this organization.

i Note
○ Always add both a header and a footer.
○ If Notification Header and Notification Footer are empty, the notification system ignores them and follows the hierarchy rules.
○ Be strict with your HTML usage: wrap your paragraphs in paragraph (<p> </p>) tags. If you don’t include a tag to separate your header and footer from the body of the message, it won’t separate from the body of the message.

6. Click Apply Changes.

Next Steps

Test your customizations by sending email to test users in different organization.

Task overview: Enabling Custom Organization Email Notifications in SAP SuccessFactors Learning
Related Information

Inheritance in Customized Learning Organization Email Notifications [page 23]

1.5.2 Inheritance in Customized Learning Organization Email Notifications

When you customize Learning organization email notifications, you can customize the highest organization record in the organization tree so that the update applies to all its sub-organizations.

Organizations are hierarchical, so the header and footer that users see could come from the users’ parent organizations. When sending a notification, the system starts looking for headers and footers at the users’ lowest organization and then works up the hierarchy until it finds a custom header and footer. When it finds either a header or footer, it stops looking and uses the header and footer at the current organization level, even if one is populated and the other is blank (for example if the header is populated with text and the footer is blank, the system stops going up the hierarchy, and sends the blank footer).

Tip

When testing, if you do not see the header and footer you expect, check to see if you configured header or footer on a child organization.

Parent topic: Enabling Custom Organization Email Notifications in SAP SuccessFactors Learning [page 21]

Related Information

Adding Custom Notification Information to SAP SuccessFactors Learning Organizations [page 22]

1.6 Learning Invitations Email Configuration

Email invitation configuration includes how you want SAP SuccessFactors Learning to set calendar appointments for users for classes.

In SAP SuccessFactors Learning, you can choose how the notification system sends calendar invitations for classes. For example, when SAP SuccessFactors Learning sends an enrollment notification to learners, it can send an .ics attachment or a calendar invitation so that learners can add the course to their calendars.

Enable calendar invites for SAP SuccessFactors Learning notifications if you want recipients to receive standard calendar invites instead of iCal attachments.

Enable Calendar Attachments for SAP SuccessFactors Learning Notifications [page 25]
Enable calendar attachments instead of calendar invites in SAP SuccessFactors Learning notifications if you can’t send calendar invites but you want to allow users to create appointments not their calendars for training.

Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 26]

Suppress informational ICS attachments for supervisors when users receive class notifications so that managers can, if they want, add their employee’s learning event to their calendars.

Enabling QR Codes to Record Attendance [page 27]

Enable QR codes to allow instructors to record users’ attendance in their courses by scanning a code that is sent to them in an enrollment email notification or on their mobile devices with the SAP SuccessFactors app.

Rules for Calendar Invites and ICS Attachments [page 28]

Understand the rules for when the system sends calendar invites or ICS attachments in notifications so that you can design your notifications correctly.

1.6.1 Enabling Calendar Invites in SAP SuccessFactors Learning Notifications

Enable calendar invites for SAP SuccessFactors Learning notifications if you want recipients to receive standard calendar invites instead of iCal attachments.

Context

Before you enable calendar invites, check the rules to make sure that calendar invites will work for you. Rules for Calendar Invites and ICS Attachments [page 28]

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to System Administration ➤ Configuration ➤ Global Application Settings ➤ Mail
2. If it isn’t already selected, select Enable Vcalendar attachments.
3. Select Send Vcalendar attachments as Calendar Invite.
4. Click Apply Changes.

Task overview: Learning Invitations Email Configuration [page 23]
Related Information

Enable Calendar Attachments for SAP SuccessFactors Learning Notifications [page 25]
Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 26]
Enabling QR Codes to Record Attendance [page 27]
Rules for Calendar Invites and ICS Attachments [page 28]
Enabling Email Notifications in SAP SuccessFactors Learning [page 6]
Rules for Calendar Invites and ICS Attachments [page 28]

1.6.2 Enable Calendar Attachments for SAP SuccessFactors Learning Notifications

Enable calendar attachments instead of calendar invites in SAP SuccessFactors Learning notifications if you can’t send calendar invites but you want to allow users to create appointments not their calendars for training.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to System Administration > Configuration > Global Application Settings > Mail.
2. Select Enable Vcalendar attachments.
3. Select Automatically send Class Enrollment Update Notification on Time Slot deletion.
   
   If you don’t select Automatically send Class Enrollment Update Notification on Time Slot deletion, then users manage their deletions manually. You experience the behavior as it was before Q1 2017.

   If you delete a segment of a class (standard or VLS), the system sends out a deletion ICS or calendar invite.
4. Click Apply Changes.

Task overview: Learning Invitations Email Configuration [page 23]

Related Information

Enabling Calendar Invites in SAP SuccessFactors Learning Notifications [page 24]
Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 26]
Enabling QR Codes to Record Attendance [page 27]
Rules for Calendar Invites and ICS Attachments [page 28]
1.6.3 Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications

Suppress informational ICS attachments for supervisors when users receive class notifications so that managers can, if they want, add their employee's learning event to their calendars.

**Prerequisites**

Informational ICS attachments apply when you send calendar invites. To check if you’re sending calendar invites, go to System Administration > Configuration > Global Application Settings, click Mail and then look at Send Vcalendar attachments as Calendar Invite. If it’s selected, then you’re sending calendar invites.

**Context**

If you’re sending calendar invites, users receive an appointment request (for example a calendar request in Microsoft Outlook). You might also want to send an .ics file to the users’ supervisors so that they can add the appointment to their calendar without being invited to the training event.

---

**Procedure**

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration > Configuration > Global Application Settings.  
2. Click Mail.  
4. Click Apply Changes.

---

**Task overview:** Learning Invitations Email Configuration [page 23]
1.6.4 Enabling QR Codes to Record Attendance

Enable QR codes to allow instructors to record users’ attendance in their courses by scanning a code that is sent to them in an enrollment email notification or on their mobile devices with the SAP SuccessFactors app.

Prerequisites

To use QR codes, your organization should have the following in place:

- The instructor dashboard accessible to instructors
- The record attendance permission for instructors
- Hardware for the instructor to read the QR Codes (an iPad)
- Enrollment notifications for users who don’t have the SAP SuccessFactors on their mobile device (users can print the QR code with their enrollment notification)

Context

i Note

QR codes can mark attendance, but they don’t post completion. For users to be marked complete, another step is required. Depending on your configuration, the instructor can mark them complete or a learning administrator marks them complete.

Procedure

1. Log in to the SAP SuccessFactors Learning administration environment.
2. Go to System Administration > Configuration > Global Application Settings > Mail.
3. Verify that Enable Vcalendar attachments is selected.

QR codes are part of the attachments in enrollment notifications. If you don’t enable the calendar attachments, users never receive their QR codes.
4. Go to **System Administration > Configuration > Global Application Settings > Global Application Settings**.

5. Select **Enable QR Codes**.

**Task overview:** Learning Invitations Email Configuration [page 23]

**Related Information**

- Enabling Calendar Invites in SAP SuccessFactors Learning Notifications [page 24]
- Enable Calendar Attachments for SAP SuccessFactors Learning Notifications [page 25]
- Suppressing Informational ICS Attachments for Supervisors when Users Receive Scheduled Offering Enrollment Notifications [page 26]
- Rules for Calendar Invites and ICS Attachments [page 28]

### 1.6.5 Rules for Calendar Invites and ICS Attachments

Understand the rules for when the system sends calendar invites or ICS attachments in notifications so that you can design your notifications correctly.

These rules apply when you send calendar invites and ICS attachments with notifications. You control some of this with the **Send Vcalendar attachments as Calendar Invite** in **System Administration > Configuration > Global Application Settings > Mail**.

**Rules for Calendars and Notifications**

<table>
<thead>
<tr>
<th>Condition</th>
<th>Learning Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virtual Learning Service (VLS) course segments are created</td>
<td>If you select <strong>Send Vcalendar attachments as Calendar Invite</strong>, then the VLS segment notification is sent as a calendar invite and the class notification is sent as an ICS attachment. The class notification remains an ICS attachment because we don’t want the client to overwrite the segment with the class or the other way around. If you don’t select <strong>Send Vcalendar attachments as Calendar Invite</strong>, then both are sent as ICS attachments.</td>
</tr>
<tr>
<td>Segments (standard or VLS) are deleted</td>
<td>Calendar invite cancellations or ICS cancellations are sent depending on how you set <strong>Send Vcalendar attachments as Calendar Invite</strong>. If you select it, then calendar invite cancellations are sent. If you clear it, then ICS cancellations are sent. Additionally, you must select <strong>Automatically send Class Enrollment Update Notification on Time Slot deletion</strong> to enable this.</td>
</tr>
</tbody>
</table>
Email Notification Archiving in SAP SuccessFactors Learning

SAP SuccessFactors Learning offers you choices for archiving email that it sends. Choose an archiving option that matches your company policy.

Email archiving in SAP SuccessFactors Learning is useful for troubleshooting and for traceability. You can see the messages that were sent from the notification system. We understand, however, that archiving policies differ from customer to customer. Some organizations are more strict about archiving personal communication and some are more lenient. We offer you choices to fit your policy.

Check your company policies to learn what they allow and prevent for special archiving of emails sent to users about, for example, their learning activities.

- If your policy prevents any special email archiving, you can configure SAP SuccessFactors Learning so that it does not archive any email notifications except in standard ways. For example, users can archive the messages that they receive.
- If your policy allows email archiving but requires you to stored on your email servers, then choose Blind Carbon Copy (BCC) archiving.
- If your policy allows email archiving and allows it within third parties like SAP SuccessFactors, you can choose to archive within SAP SuccessFactors.
1.7.1 Preventing Email Notification Archiving

Prevent email notification archiving if you don’t need the archive for troubleshooting or if your company policy doesn’t allow email archives.

Context

Check your company policies to learn what they allow and prevent for special archiving of emails sent to users about, for example, their learning activities.

- If your policy prevents any special email archiving, you can configure SAP SuccessFactors Learning so that it does not archive any email notifications except in standard ways. For example, users can archive the messages that they receive.
- If your policy allows email archiving but requires you to stored on your email servers, then choose Blind Carbon Copy (BCC) archiving.
- If your policy allows email archiving and allows it within third parties like SAP SuccessFactors, you can choose to archive within SAP SuccessFactors.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to [System Administration] > [Configuration] > [Global Application Settings] > [Mail].
2. Clear Enable Email Archiving.
   - When you clear Enable Email Archiving, we don’t archive any email messages. So, there are no messages to purge.
3. Choose Apply Changes.

1.7.2 Enabling BCC Email Archiving in SAP SuccessFactors Learning

Enable BCC email archiving in SAP SuccessFactors Learning so that Learning to keep a record of the information that you sent to users in email notifications and to keep it on your email servers as opposed to in SAP SuccessFactors Learning.

Prerequisites

You archive mail to an email address that you control. Ask your company Information Technology (IT) team to create an email address for you for the purpose of archiving the email messages that go to users. You can tell your
IT team that it needs standard archiving and limiting rules to delete messages after a period of time and to keep the mailbox below a set size.

**Context**

Your organization might have a policy that data must be purged on an interval. Check your policy to see if you must purge the data on a specific interval.

Check your company policies to learn what they allow and prevent for special archiving of emails sent to users about, for example, their learning activities.

- If your policy prevents any special email archiving, you can configure SAP SuccessFactors Learning so that it does not archive any email notifications except in standard ways. For example, users can archive the messages that they receive.
- If your policy allows email archiving but requires you to stored on your email servers, then choose Blind Carbon Copy (BCC) archiving.
- If your policy allows email archiving and allows it within third parties like SAP SuccessFactors, you can choose to archive within SAP SuccessFactors.

**Procedure**

1. Go to SAP SuccessFactors Learning learning administration and then go to System Administration ➤ Configuration ➤ Global Application Settings ➤ Mail ➤
2. Select Enable Email Archiving.
3. Select BCC Address For Archiving and then type the address that the IT organization gave you in the text box.

**1.7.3 Enabling Email Archiving Inside SAP SuccessFactors Learning Learning**

Automatically purge the SAP SuccessFactors Learning email archive to keep your application clean of past email notifications and data.

**Context**

Your organization might have a policy that data must be purged on an interval. Check your policy to see if you must purge the data on a specific interval.

Check your company policies to learn what they allow and prevent for special archiving of emails sent to users about, for example, their learning activities.
• If your policy prevents any special email archiving, you can configure SAP SuccessFactors Learning so that it does not archive any email notifications except in standard ways. For example, users can archive the messages that they receive.
• If your policy allows email archiving but requires you to stored on your email servers, then choose Blind Carbon Copy (BCC) archiving.
• If your policy allows email archiving and allows it within third parties like SAP SuccessFactors, you can choose to archive within SAP SuccessFactors.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration > Configuration > Global Application Settings > Mail.
2. Select Enable Email Archiving.
3. Select Purge Emails older than, and then type a number of months that SAP SuccessFactors Learning retains email notifications before they are purged.
   For example, if you type 2, then we purge any emails from the archive that are older than two months.

Next Steps

Check the batch site of the purge. Go to System Administration > Configuration > System Configuration and then open LMS_ADMIN. Find emailArchivePurgeBatchCount and make sure that it is set to the default value.
2 Customizing Notifications in the Notification Editor

Use the notification editor to edit the system notifications that users receive.

Prerequisites

Enable the notification editor. Enabling the Rich Text Learning Notification Editor [page 38]

Context

SAP SuccessFactors Learning sends notifications to users about learning events, enrollment, and so on. When you first implement SAP SuccessFactors Learning, it includes default notifications. You can edit those notifications if you need to customize them for your business.

Procedure

1. Go to System Administration > Manage Email Notifications > Email Notification Templates find, and open the notification you want to edit.
   Searching for Notification Templates [page 34]
2. Click Messages.
3. Click Launch Editor.

Related Information

Editing and Formatting Notification Text [page 34]
Adding Dynamic Content to Email Notifications [page 36]
Adding an Attachment to SAP SuccessFactors Learning Notifications [page 37]
Inserting Direct Links into Notifications [page 38]
2.1 Searching for Notification Templates

Search for notification templates when you want to edit the email messages that SAP SuccessFactors Learning sends.

Procedure

1. Look at the list of notifications to find the name of the template that you want to edit.
   Email Notification Template Groups in SAP SuccessFactors Learning [page 53]
2. Go to SAP SuccessFactors Learning Administration and then go to System Administration > Manage email > Email Notification Templates
3. Use the search menu to find the template you want to edit.

Next Steps

Edit the notification template.

Related Information

Customizing Notifications in the Notification Editor [page 33]

2.2 Editing and Formatting Notification Text

You can edit the subject and body of any SAP SuccessFactors Learning notification using plain text and then format it with HTML.

Prerequisites

This process describes how you add and format text with the rich text notification editor. If you haven’t yet enabled it, then you can use the legacy notification editor. We recommend that you enable the rich text notification editor.

To edit the text, first search for and find the notification that you want to edit, and then open it in the notification editor. Customizing Notifications in the Notification Editor [page 33]
Context

When customizing notification messages, most customers can change a little text or format the text slightly. You might, for example, want to add a link to your learning system or you might want to add a tag line. Otherwise, you can use the rest of the notification in its default form.

Procedure

1. In the list of languages, select the language that you want to edit.
   Many companies support users of multiple languages. If you support multiple languages, you should consider translation as part of your effort. You can send the text that you type to a translator who can change the text for you. When the translator returns the text, you can switch your language and paste the text into the Body in the right place.

   **i Note**
   If you’re accustomed to the legacy editor, you might think that you’re changing labels on the back end. But the new notification editor doesn’t change labels. You are, therefore, immune to upgrades overwriting your customizations.

2. In Subject, change the subject for the recipient.
3. In the Body section, edit the text.
4. To format the text, select it and use one of the formatting buttons to change its appearance.

Related Information

Enabling the Rich Text Learning Notification Editor [page 38]

2.3 Searching the list of supported tags for any SAP SuccessFactors Learning Notifications Template

Search what tags are supported in a particular notification template.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to System Administration Manage Email.
2. Search for the notification template for which you wish to see the supported tags.
3. Click *Edit or View*.
4. Go to *Messages* and click *Syntax Tags*.

**Results**

You’ll now be able to see the list of tags supported for that particular notification template.

2.4  **Adding Dynamic Content to Email Notifications**

Add dynamic content to email notifications to pull in data that applies to the particular email notification as opposed to boilerplate that applies to all recipients and every email notification.

**Prerequisites**

This process describes how you add dynamic content with the rich text editor for email notifications. If you haven’t yet enabled it, then you can use the legacy editor. We recommend that you enable the rich text editor.

To edit the text, first search for and find the email notification that you want to edit and then open it in the email notification editor. *Customizing Notifications in the Notification Editor* [page 33]

**Context**

You often want to send dynamic content in an email notification message. For example, if you want to send an email notification that contains a list of learning items that have met the minimum threshold for scheduling a course, you want your email notification to include a list of those learning items. The list is dynamic: it changes every time the email notification is sent.

To send dynamic content, you use tokens. They’re placeholders for information that originates from the database. For example, if you include the "&END-DTE=" token ID in an email notification template, then the actual end date of the activity replaces the token ID when SAP SuccessFactors Learning Administration stores the email notification message in the PA_MAIL table.

**Procedure**

1. Go to SAP SuccessFactors Learning Administration, and then go to *System Administration > Manage Email* > *Email Notification Templates*. 
2. Search and find the e-mail template that you want to modify.
3. Choose *Edit* to modify the required e-mail template from the search results list.
4. Go to *Messages* and choose *Launch Editor*.
5. In *Body*, place your cursor where you want to insert the dynamic text.
6. Choose *Edit Syntax Tag* to find the token that you want to insert and click it.
   
   The set of tokens for any one email notification is set at the application level and you can’t change it.
7. To remove a token, click the close button for the token.

**Related Information**

*Enabling the Rich Text Learning Notification Editor [page 38]*

### 2.5 Adding an Attachment to SAP SuccessFactors Learning Notifications

Add attachments to notifications when you want the email messages that SAP SuccessFactors Learning sends to have an attachment.

**Procedure**

1. Go to SAP SuccessFactors Learning Administration and then go to *System Administration* ➤ *Manage Email* ➤ *Email Notification Templates*.
2. Find the notification template that needs the attachment.
   
   *Searching for Notification Templates [page 34]*
3. Go to *Attachments*.
4. Add the information in the section and then click *Choose File* to upload the file and then click *Add*.

   For each attachment, you must add a unique attachment ID, and the path to the attachment must be accessible to SAP SuccessFactors Learning Administration. The attachment can’t exceed 1 MB.
2.6 Inserting Direct Links into Notifications

Insert direct links into SAP SuccessFactors Learning notifications so that you can direct recipients to a specific place in the application.

Context

Direct links are useful if you want your notification to take a user to a specific place in SAP SuccessFactors Learning. When you use direct links, you don't compromise system security. Users must log in if they aren't logged in already, and they can access only the sections of the user interface that their permission restrictions allow.

You can insert a hyperlink into a notification so that users can directly access certain locations in the user interface (after they have provided logon information, if they aren't already logged on). To ensure that you use the correct URL for the link, we recommend that you generate a direct link () that you can paste into the notification.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to System Administration > System Management Tools > Generate Direct Link.
2. Build the direct link that you want to insert into the notification and then copy the link.
3. Go to System Administration > Manage Email > Email Notification Templates.
4. Find the notification that you want to edit, open it, and then go to Messages and click Launch Editor.
5. Place your cursor in the body where you want to add the link and then click Insert/edit link.
6. Paste the direct link in Url and complete the other fields.
7. Click Ok.

2.7 Enabling the Rich Text Learning Notification Editor

Enable the rich text notification editor for a What You See Is What You Get (WYSIWYG) editing experience.

Prerequisites

Before you upgrade, we recommend that you understand how the rich text editor works and how you plan to use it.

Customizing Notifications in the Notification Editor [page 33]
Work Around for LOOP Tags in Tables for Notifications [page 45]
Procedure

1. Go to System Administration > Configuration > Global Application Settings.
2. Select Use Editor Content When Sending Email Notification to enable the editor system-wide.
3. Go to System Administration > Manage Email Notification.
4. Open a notification template that you want to edit and then go to Messages.
5. To edit the content but still rely on the existing message syntax, click Launch Editor but do not select Use Editor Content When Sending this Notification.
6. When you are ready to begin sending notifications based on the rich text editor, select Use Editor Content When Sending this Notification for each individual message.

2.8 Finding the Relationships Among Notification Components

To work with notifications, you often need to find how its main components relate to one another so that you know which component to change.

Prerequisites

Before you begin, be sure to understand how the components work together. The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 50]

Procedure

1. Go to System Administration > Manage Notification > Email Notification Templates and in Records per Page, select All.
2. Use your browser’s Find option to find the template you’re looking for or use this help.
   - Template ID to Trigger to Receiver Map [page 68]
   - Locations Where You can Send Ad Hoc Notifications in SAP SuccessFactors Learning [page 100]
3. Click the Edit or the View button for the template (depending on whether you want to edit it or just view the relationships).
4. In Summary, look at the Syntax ID field.
   - This is the notification template’s Syntax ID. You can edit the syntax object in System Admin > Configuration > Notification Syntax.
5. In Messages, look for the labels that the notification is using by searching for label key=.
The value of the key attribute is a label ID, which resolves to text in the recipient’s native language. You can edit the value that it resolves to in References > Geography > Labels.

6. In Messages, click Syntax Tags.

You see a list of the syntax tags that are permitted for this syntax object and this notification template and a description of the syntax tag.

2.9 Rendering SAP SuccessFactors Learning Notification Messages for Testing

We make changes in the notification editor so that messages can be rendered properly for testing.

Templates from the Legacy Editor are automatically brought into in the new notification editor, which renders a preview of the preprocessed template. When we bring templates into the new editor and render them for live preview and email preview, we make changes so that the message can be tested in many email clients:

- Add appropriate HTML elements to support the body content being rendered in the preview.
- Render standard HTML elements in their native formats (for example, tables are rendered as actual tables).
- Render syntax tag descriptions with appropriate wrappers in the place of tags because the template is not connected to a data set at the time that you test it.
- Escape tags used in href of a and src of img because the template is not connected to a data set at the time that you test it.
- Convert special tags like LOOP to their equivalent implementation for the rich text editor.
- Handle a special condition where the LOOP tag is used within a table.

Related Information

Learning Notification Code View [page 42]
Work Around for LOOP Tags in Tables for Notifications [page 45]
Iterative Syntax Tags: LOOP and ROLLUP [page 41]

2.10 SAP SuccessFactors Learning Email Notification Template Migration

When you first open notification templates in Email Notification Template Editor, SAP SuccessFactors Learning you should check for errors in the template before and after you open it.

You open Email Notification Template Editor by going to System Administration > Manage Email > Email Notification Templates finding and opening the template, going to Messages, and then choosing Launch Editor.
Before you choose Launch Editor, look if style elements are outside of the body element. We support style only when it is inside body.

After you choose Launch Editor, check that:

- The content of body loads correctly in the new editor.
- The inline style elements work (test the notification for formatting).

Related Information

Legacy Notification Template Editor [page 79]
Viewing Original Email Notification Templates [page 80]

2.11 Iterative Syntax Tags: LOOP and ROLLUP

In SAP SuccessFactors Learning, LOOP and ROLLUP tags iterate over data to create lists.

SAP SuccessFactors Learning uses iterative syntax tags for some notification messages. Iterative syntax tags iterate, or loop, over a series of data. For example, the ApmComponentRequest notification template sends a list of courses that users are requesting. It uses the LOOP iterative tag to loop over the list of requested courses and add individual course information.

Restriction

Although you can use these special tags in any notification template, unless you take action with other tags learners do not receive the iterative information.

LOOP Tag

The LOOP tag is the most common iterative tag. Use it to loop over a section of the notification to build lists. For example, you can loop over items to add the item type ID, the item ID, the revision, and the title for all items assigned to a user.

Sample Code

<!-- This message text is outside the loop, so it is added -->
<!-- once at the beginning of the email. -->
<label key="notification.ApmComponentRequest.MessageText1"/>
<!-- This is the start of the loop. The loop logic is standard: -->
<!-- as long as the number of courses written to the message -->
<!-- is less than the total amount fetched from the database -->
<!-- the iterative tag continues to write -->
<LOOP>
<!-- This message is inside the loop so it is written once for each course on -->
<!-- the request list -->
<label key="notification.ApmComponentRequest.MessageText2"/>
<!-- These values are written for each requested course fetched. -->
Caution

Restrict LOOP tags to a list: a subset of your notification template. If you surround the entire notification template with LOOP tags, the notification system builds very large messages and you are likely to run out of memory.

Rollup Tags

In addition to the LOOP tag, we include these special iterative tags called rollup tags. They are shortcuts so that you do not always need to build a full loop structure.

<table>
<thead>
<tr>
<th>Tag Name</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>&amp;ROLLUP_MESG</td>
<td>This forces the text that precedes it to appear in non-user notifications.</td>
</tr>
<tr>
<td>&amp;ROLLUP_STUD_ID</td>
<td>This displays the ID of each user who receives the notification message.</td>
</tr>
<tr>
<td>&amp;ROLLUP_STUD_NAME</td>
<td>This displays the last name, first name, and middle initial of each user who receives the notification message</td>
</tr>
</tbody>
</table>

2.11.1 Learning Notification Code View

Administrators view the underlying code of notifications when working in the SAP SuccessFactors Learning notification editor.

If something is not working in the rich text editor, you can always edit the mark-up directly. Click the Source code button to open the source code view.
If you are familiar with the code from Q3 2015 and earlier, you notice that the code differs. The code in the learning notification code view is the code that renders the rich text, not the syntax tags or labels themselves. Follow these tips to help you with the code.

**Working with the Code**

Copy the code out of the code view and paste it into an HTML or XML editor. The editor will give you more tools for formatting, syntax highlighting, and so on. You can use the code view for light editing, but we don’t recommend it if you are making larger changes to the syntax.
Working with Syntax Tags and Locale Labels

In Q3 2015 and earlier, you used the legacy notification editor in System Administration ➔ Manage Email ➔ Email Notification Templates ➔ Messages. In that editor, you could directly edit:

- **Data syntax tags** like `<SCHED_ID/>` - these syntax tags add data. For example, `<SCHED_ID/>` added the scheduled offering ID.
- **Logic syntax tags** like `<LOOP></LOOP>` - these syntax tags add logic. For example, `<LOOP></LOOP>` created a loop over a list of classes, users, and so on so that users could receive a digest email instead of individual emails for each scheduled offering, user, and so on.
- **Label keys** like `<label key="notification.ApmWaitlistRequest.MessageText2" arg0=... />` - These label keys looked up the text in users' set locales and rendered it for that user. You could pass the label keys arguments like data syntax tags to compose a message with dynamic data.

In Q4 2015 and later, the rich text notification editor hides the complexity of the tags. As a side effect, it changes the way that you are accustomed to working in the code.

Data syntax tags look a little different because the code view shows you what it does to **render** the syntax tags for the rich text editor instead of the syntax tag itself. For example, in the Q3 2015 and previous release, if you wanted to insert a user ID into a notification, you types `<STUD_ID/>`. In Q4 2015 and later, we render the syntax ID as follows:

```
<!--This is the wrapper that renders the rounded-edge box in the RTE -->
<span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper">
<!--This is the actual data syntax tag (data-tag) with what you see -->
<span class="syntaxTagClass" data-tag="tag">User ID</span>
<!--This line creates the X in the RTE. The X deletes the data syntax tag -->
<span id="deleteTag" class="deleteTag" contenteditable="false"></span>
<!--Closing the wrapper-->
</span>
```

The logic syntax tag `<LOOP></LOOP>` is an exception to the above. When you open the code view, you see the rich text editor rendering of the tag. Here is an example of the start loop rendering:

```
<!--This is the wrapper that renders the rounded-edge box in the RTE -->
<span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper">
  <span class="syntaxTagClass" data-tag="tag">Start Loop</span>
  <span id="deleteTag" class="deleteTag" contenteditable="false"></span>
</span>
```

That rendering works for lists, but it does not work for tables. If you want to insert a table, you must go back to the Q3 2015 and earlier rendering in the code view. For example:

```
<table>
  <tr>!--Your column headings --></tr>
  <LOOP>
    <tr>!--A repeating row--></tr>
  </LOOP>
</table>
```
Labels are no longer rendered. Instead, you see the text from the label key "shine through" to the rich text editor. Because the editor knows the locale (you select it in the editor), it can retrieve the text itself and display it to you. This creates a slight side effect in the code view: you must be aware of the locale that you originally selected in the rich text editor.

Related Information

Work Around for LOOP Tags in Tables for Notifications [page 45]

2.11.2 Work Around for LOOP Tags in Tables for Notifications

Learning administrators who want to create batch notifications that include tables must work around a limitation with loop tags.

Background: Q3 2015 and Earlier Use of LOOP Tags

Tables are a common customization in SAP SuccessFactors Learning. Companies want to create digest emails to tell their employees, for example, all users who have been added to a waitlist. The employees don’t want an individual email for each employee, they want a batch email that tells them all users who have been added after the last time they were notified.

In the past, the default notifications were difficult to read, so many companies customized them by formatting the notifications with tables. To continue the example, each waitlisted user went into a new row in a table. To create a loop that adds rows for each user, you use the logic syntax tag <LOOP></LOOP>. The result is syntax like the following.

```
<table>
  <tr>
  <!-- In an actual notification, the heading rows would be label keys. -->
  <!-- For clarity, they are plain text in this example. -->
  <th>User Name</th>
  <th>User ID</th>
  <th>Item Key</th>
  <th>Course Title</th>
  <th>Registration Status</th>
  <th>Offering ID</th>
  </tr>
  <!-- Start of loop for each body row (each user) -->
  <LOOP>
  <tr>
    <td><STUD_NAME/></td>
    <td><STUD_ID/></td>
    <td><CPNT_TYPE_ID/> - <CPNT_ID/> - <REV_DATE/></td>
  </tr>
  </LOOP>
</table>
```
Use of LOOP Tags Without Tables

With the introduction of the rich text editor, we include the `<LOOP></LOOP>` tags. If you click Code View, however, you notice that the loop tags are no longer in the code as `<LOOP></LOOP>`. Instead, you see the following. This is called a “span wrapper” because it wraps what you see in the rich text editor with span tags. The span wrappers for LOOP tags are the current limitation.

```html
<!-- This is what start of loop looks like -->
<span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper">
  <span class="syntaxTagClass" data-tag="tag">Start Loop</span>
  <span id="deleteTag" class="deleteTag" contenteditable="false"/>
</span>

<!-- The batched contents go here -->

<!-- This is what end of loop looks like -->
<span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper">
  <span class="syntaxTagClass" data-tag="tag">End Loop</span>
  <span id="deleteTag" class="deleteTag" contenteditable="false"/>
</span>
```

Importantly, as long as you avoid tables, the span wrappers for LOOP tags work as expected. For example, if you create a list of users and separate them with punctuation, the loop tags work as expected in the rich text editor.

Use of LOOP Tags with Tables

If you want to use tabular formatting, you must open the code view and remove the span wrappers for the LOOP tags and replace them with the Q3 2015 and previous formatting. You change them to simply `<LOOP>` to start the loop and `</LOOP>` to close the loop.

The Q4 2015 and later example below results in the same notification as the Q3 2015 and previous example above. Notice that the loop span wrapper tags have been replaced with `<LOOP>` and `</LOOP>`.

```html
<!-- When working with the Q4 2015 and later notification editor, -->
<!-- you do not need labels because the editor knows its language context. -->
```
<table>
<thead>
<tr>
<th>User Name</th>
<th>User ID</th>
<th>Item Key</th>
<th>Course Title</th>
<th>Registration Status</th>
<th>Offering ID</th>
</tr>
</thead>
</table>

**Modifying Learning Notification Templates**

**Customizing Notifications in the Notification Editor**
Repeating rows is the most likely use of loops in tables, but if you choose to repeat columns, you must follow the same pattern.

```html
<!-- LOOP tag without span wrapper -->
<tr>
    <!-- data syntax tags go here -->
</tr>
</LOOP>
</table>
```

### Sample Code

SAP SuccessFactors Learning builds and sends email messages as notifications.

You can configure SAP SuccessFactors Learning to send email messages to one or more individuals when an event occurs or a condition is met. For example, SAP SuccessFactors Learning can send email messages to administrators, managers, instructors, users, or other contacts when:

- An automated process or background job is completed.
- A user registers, withdraws from, requests, or is added to a waiting list for a course.
- A class is rescheduled or canceled.
- A competency assessment must be completed.
- Inventory must be reordered.

You can provide a different email address in the **Application Notification Reply-To Email** field for email notifications. The e-mail address in the **Application Notification Admin Email** field is populated based on the data configured in the **Application Notification Admin Email** or the **Application Notification User Email** fields. Letting customers use a different e-mail address enhances their user experience by letting customers decide the stakeholders they want to notify by defining relevant e-mail addresses of their choice.

---

**SAP SuccessFactors Learning Notification Email Templates**

Notification email templates control the format and content of email messages sent from SAP SuccessFactors Learning.

**SAP SuccessFactors Learning Notification Email Syntax Tags**
2.12.1 SAP SuccessFactors Learning Notification Email Templates

Notification email templates control the format and content of email messages sent from SAP SuccessFactors Learning.

Notification templates format a batch of email messages to learners. Each template sends a different kind of bulk mail. For example, one template might produce a bulk message to all learners in a class about the time and place where it meets and another might inform users that they have moved from the class waitlist to an enrolled member of the class.

Each template contains both personalized and generic content.

- Generic content is boilerplate that appears in the message for all users. For example, a notification template that formats messages confirming enrollment might have generic content that says “Congratulations, you are now enrolled!”: all recipients receive the congratulations. Labels insert generic content.

- Personalized content is unique to the instance of the message. For example, in a template that sends enrollment notifications to managers, generic content could be “The following members of your team have enrolled in a course:” and the personalized content could be the first and last name of user. Syntax tags insert personalized content.

Tip

You can think of notification email templates as mail merge templates.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 48]

Related Information

SAP SuccessFactors Learning Notification Email Syntax Tags [page 50]
The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 50]
The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 52]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 53]
2.12.2 SAP SuccessFactors Learning Notification Email Syntax Tags

Syntax tags insert dynamic content into SAP SuccessFactors Learning notification email templates.

In SAP SuccessFactors Learning, notification templates have a closed set of syntax tags. The set is grouped by a notification syntax name. For example, APM_COMPONENT_REQUEST is the notification syntax group for the tags that Learning uses to send email messages about the Item Request Notification automatic process. You can see the available tags by either going to System Administration > Manage Email > Email Notification Token Sets or by editing the notification template in the notification template editor.

For example, if you are editing the item request notification, you see a list of syntax tags in the Syntax Tags section of the editor. Among the list of syntax tags (placeholders for dynamic content) is the learning item title. The learning item title syntax tag is in the list of syntax tags because it is among the set of tags in APM_COMPONENT_REQUEST.

! Restriction
You cannot add syntax tags: they are set by SAP SuccessFactors.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 48]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 49]
The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 50]
The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 52]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 53]

2.12.3 The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates

To work with SAP SuccessFactors Learning, you need to understand the relationship among its primary components.

When you work with notifications, you have three components to consider: the notification template, the syntax object, and the syntax tags. Most of your work is to understand how the components are related to one another. SAP SuccessFactors Learning, exposes the relationships in the administration environment, but not the purpose of each component and how they work together.

- Syntax tags provide dynamic data, like a mail merge. For example, for each learning plan notification that the system sends, it dynamically includes the users’ first name for the <FIRST_NAME/> syntax tag placeholder.
- Syntax objects define how those placeholders work and what translated text the notification system should use. For example, the learning plan syntax object defines what readers should see in the subject line, in the
body of the email, and how the message should iterate over a list of added, modified, and removed plans. Importantly, it also identifies the label IDs so that users can read the notification in their own language.

- Notification Templates wrap syntax objects and provide the hook to the triggering event and provide attachments. For example, the Learning Plan Notification automatic process triggers the ApmStudentLearningPlanNotification template.

Example

1. When the Learning Plan Notification automatic process runs, it triggers the notification template ApmStudentLearningPlanNotification. If there are attachments associated with this notification template in System Administration ➔ Manage Email ➔ Email Notification Templates ➔ Attachments, the notification system will attach them to the email.
2. The notification system looks up the syntax object associated with ApmStudentLearningPlanNotification and finds the syntax object APM_STUDENT_LEARNING_PLAN_NOTIFICATION.
3. From APM_STUDENT_LEARNING_PLAN_NOTIFICATION, the notification system obtains the rules and format of the message. For example, APM_STUDENT_LEARNING_PLAN_NOTIFICATION loops over added, modified, and deleted assignments to create three list categories. It also uses the label ID notification.ApmStudentLearningPlanNotification.MessageText1, which resolves to text in the users’ native languages.
4. Each syntax tag, like <REVISION_DATE_DELETED/>, pulls in the instance text for the user. For example, for each learning item that is deleted, <REVISION_DATE_DELETED/> pulls in the revision date of the deleted learning item.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 48]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 49]
SAP SuccessFactors Learning Notification Email Syntax Tags [page 50]
The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 52]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 53]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 53]
Legacy Notification Templates Editor Sections [page 80]
Using Locale Labels to Translate Notifications (Legacy Editor) [page 81]
Template ID to Trigger to Receiver Map [page 68]
Email Notification Template Groups in SAP SuccessFactors Learning [page 53]
2.12.4 The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning

SAP SuccessFactors Learning has two types of notification email messages: ad hoc and system. They serve two different purposes and work a little differently.

System Notification Templates

System provided notification templates are triggered by learning events, like a registration or an automatic process. When they’re configured properly, they are automatic. For example, when learners register for classes, they receive notifications about the time and place of the class, their managers are informed that they’re enrolled, and so on.

System notification templates aren’t flexible: they have a defined set of syntax tags and each template has a trigger.

Ad Hoc Notification Templates

Ad hoc notification templates allow administrators to send email messages pages that define users in SAP SuccessFactors Learning Administration. For example, in Learning Activities Classes, administrators can click Send Notifications to send a message to users who are associated with the class (enrolled, waitlisted, and so on).

Because ad hoc notifications are triggered by a person, they have a special set of syntax tags and different rules.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 48]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 49]
SAP SuccessFactors Learning Notification Email Syntax Tags [page 50]
The Relationship Among Syntax Tags, Syntax Objects, and Notifications Templates [page 50]
How SAP SuccessFactors Learning Generates Email Message Notifications [page 53]
Locations Where You can Send Ad Hoc Notifications in SAP SuccessFactors Learning [page 100]
Notification Tags Available in Ad Hoc Notifications [page 66]
2.12.5 How SAP SuccessFactors Learning Generates Email Message Notifications

This explains how email notifications are generated from SAP SuccessFactors Learning.

The system stores the notification messages in the PA_MAIL table and sends them asynchronously to the SMTP server, using an internal task scheduler. Therefore, email generation in depends on:

- The SMTP configuration parameters being specified correctly.
- The SMTP server itself being available and configured with the corresponding parameters in SAP SuccessFactors Learning. If the SMTP server rejects e-mail messages ("relaying denied"), then the system will not redeliver the messages at a later time. Rejected messages are discarded without indications other than some errors in the output log of the application server.

Additionally, the system relies on e-mail addresses attached to users, supervisors, and administrators in SAP SuccessFactors Learning to be specified (not blank) and valid; otherwise, the cannot generate proper email messages. If you schedule a background job and that job fails, then the system generates no email message; therefore, no email message is sent or stored in the PA_MAIL table.

Parent topic: SAP SuccessFactors Learning Email Notification Messages [page 48]

Related Information

SAP SuccessFactors Learning Notification Email Templates [page 49]
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The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 52]

2.13 Email Notification Template Groups in SAP SuccessFactors Learning

Email notification template groups categorize notification templates.

Template categories are useful to understand utility templates, unused templates, and user-facing templates. They are not a technical grouping. They are a functional grouping.
2.13.1 Automatic Process Templates

SAP SuccessFactors Learning administrators, users, and managers receive email messages based on these templates when an automatic process manager (APM) completes its job.

### i Note

Template IDs continue to use previous terminology. For example, while the term catalog changed to library, the template ID remains ApmUpdateCatalogPrice.

<table>
<thead>
<tr>
<th>This Template ID</th>
<th>Is used as Follows</th>
</tr>
</thead>
<tbody>
<tr>
<td>ApmAttachmentQuotaWatch</td>
<td>You can use the ApmAttachmentQuotaWatch template ID to customize the message that identifies when the cumulative size of attachments hits a threshold percentage of the maximum allowed.</td>
</tr>
<tr>
<td>ApmCouponExpiry</td>
<td>You can use the ApmCouponExpiry template ID to customize the message that the system sends to the person whose email address is in the Owner Email box of the expiring coupon entity.</td>
</tr>
<tr>
<td>ApmComponentRequest</td>
<td>You can use the ApmComponentRequest template ID to customize the message that an administrator receives when a class reaches its minimum registration.</td>
</tr>
<tr>
<td>ApmInitiativeEmployeeNotification</td>
<td>You can use the ApmInitiativeEmployeeNotification template ID to customize the message that employees receive when their organization is assigned to an initiative.</td>
</tr>
<tr>
<td>ApmInitiativeOwnerNotification</td>
<td>You can use the ApmInitiativeOwnerNotification template ID to customize the message that organization owners receive when they’re assigned to an initiative.</td>
</tr>
<tr>
<td>ApmInitiativeRequiredReminder</td>
<td>You can use the ApmInitiativeRequiredReminder template ID to customize the message that organization owners receive when an initiative approaches its due date.</td>
</tr>
<tr>
<td>ApmInstanceDelivery</td>
<td>You can use the ApmInstanceDelivery template ID to customize the message that users and managers receive when users are enrolled in a class.</td>
</tr>
<tr>
<td>ApmQualificationCleanup</td>
<td>You can use the ApmQualificationCleanup template ID to customize the message that an administrator receives when the curriculum cleanup process is completed.</td>
</tr>
<tr>
<td>This Template ID</td>
<td>Is used as Follows</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ApmResetOnlineComponents</td>
<td>You can use the ApmResetOnlineComponents template ID to customize the message that an administrator receives when the reset online item process resets items to the beginning for users who started but didn’t complete an item before its expiration date.</td>
</tr>
<tr>
<td>ApmReviewCouldNotStartContactError</td>
<td>You can use the ApmReviewCouldNotStartContactError template ID to customize the message that an administrator receives when a review process can’t start because one or more users don’t have a manager.</td>
</tr>
<tr>
<td>ApmReviewInitiationContactError</td>
<td>You can use the ApmReviewInitiationContactError template ID to customize the message that an administrator receives when an ongoing review process can’t start because a user doesn’t have a manager.</td>
</tr>
<tr>
<td>ApmReviewInitiationSummary</td>
<td>You can use the ApmReviewInitiationSummary template ID to customize the message that an administrator receives when a new performance review begins.</td>
</tr>
<tr>
<td>ApmStudentLearningPlanNotification</td>
<td>You can use the ApmStudentLearningPlanNotification template ID to customize the message that users and managers receive when a learning plan changes.</td>
</tr>
<tr>
<td>ApmSupervisorLearningPlanNotification</td>
<td>You can use the ApmSupervisorLearningPlanNotification template ID to customize the message that managers receive that lists users who have and haven’t completed items.</td>
</tr>
<tr>
<td>ApmSupervisorReviewIncompleteAssessment</td>
<td>You can use the ApmSupervisorReviewIncompleteAssessment template ID to customize the message that managers receive when they’re assigned to review a performance assessment and one or more raters haven’t submitted their assessments.</td>
</tr>
<tr>
<td>ApmSynchronizeStudentChangesAssignmentProfile</td>
<td>You can use the ApmSynchronizeStudentChangesAssignmentProfile template ID to customize the message that administrators receive when the automatic process removes users whose attributes and security domains no longer match those of the assignment profile. This APM also adds users whose attributes and security domains match those of the assignment profile.</td>
</tr>
<tr>
<td>ApmTrainingExpiration</td>
<td>You can use the ApmTrainingExpiration template ID to customize the message that users and managers receive when an assigned item approaches its due date for completion.</td>
</tr>
</tbody>
</table>
This Template ID | Is used as Follows
---|---
ApmTrainingOverdue | This email notification template is used if SuccessFactors Overdue Learning Notification is selected in System Administration → Automatic Processes → Learning Expiration Email Notification. Otherwise, when users have overdue learning items, they receive email notifications based on Apm-TrainingExpiration.
ApmUpdateCatalogPrice | You can use the ApmUpdateCatalogPrice template ID to customize the message that an administrator receives when a library price changes.
ApmVlsAttendanceProcessing | You can use the ApmVlsAttendanceProcessing template ID to customize the message that an administrator receives when attendance entities for a VLS session are compiled.
ApmWaitlistRequest | You can use the ApmWaitlistRequest template ID to customize a message that an administrator receives when users who are on a waiting list for a class can’t be enrolled in it and are placed on a waiting list for the next available class.
ItemEvaluationAssignmentNotification | You can use the ItemEvaluationAssignmentNotification template ID to customize the message that users receive when users are assigned a new survey.
JamGroupInvitation | You can use the JamGroupInvitation template ID to edit the message that the system sends when an administrator sets an invitation setting while associating an item with a Jam group.
FollowupEvaluationAssignmentNotification | You can use the FollowupEvaluationAssignmentNotification template ID to customize the message managers receive when users are assigned a new survey.

2.13.2 Assessment Process Templates

Use Assessment Process templates to customize email messages individuals receive when an assessment process event is completed, when the recipient(s) must complete a task, or when the assessment process changes.

**Note**
Assessment process notifications are unusual because most of them apply to Plateau legacy products.
<table>
<thead>
<tr>
<th>This Template ID</th>
<th>Is Used as Follows</th>
</tr>
</thead>
<tbody>
<tr>
<td>ApmAdminAssessmentReminder</td>
<td>You can use the ApmAdminAssessmentReminder template ID to customize the message that an administrator receives when a user hasn’t yet completed an assessment.</td>
</tr>
<tr>
<td>ApmExternalAssessmentReminder</td>
<td>You can use the ApmExternalAssessmentReminder template ID to customize the message that raters receive when an assessment process approaches its due date.</td>
</tr>
<tr>
<td>ApmLearnerAssessmentReminder</td>
<td>You can use the ApmLearnerAssessmentReminder template ID to customize the message that a user receives when an assessment process approaches its due date.</td>
</tr>
<tr>
<td>AssessmentProcessAdministrator</td>
<td>You can use the AssessmentProcessAdministrator template ID to customize the message that an administrator receives when an assessment begins.</td>
</tr>
<tr>
<td>AssessmentProcessAssessorApprover</td>
<td>You can use the AssessmentProcessAssessorApprover template ID to customize the message that a supervisor receives after a user has selected the raters for his or her assessment process.</td>
</tr>
<tr>
<td>AssessmentProcessAssessorRemoved</td>
<td>You can use the AssessmentProcessAssessorRemoved template ID to customize the message that a rater receives when his or her assessment performance ratings are no longer needed for the users listed in the message.</td>
</tr>
<tr>
<td>AssessmentProcessAssessorsRejected</td>
<td>You can use the AssessmentProcessAssessorsRejected template ID to customize the message that a supervisor receives when an approver rejects one or more of the raters that the supervisor selected for a user’s performance assessment.</td>
</tr>
<tr>
<td>AssessmentProcessCancellationAssessor</td>
<td>You can use the AssessmentProcessCancellationAssessor template ID to customize the message that raters receive when a performance assessment is canceled.</td>
</tr>
<tr>
<td>AssessmentProcessCancellationAssessorApprover</td>
<td>You can use the AssessmentProcessCancellationAssessorApprover template ID to customize the message that rater approvers receive when a performance assessment is canceled.</td>
</tr>
<tr>
<td>AssessmentProcessCancellationNominator</td>
<td>You can use the AssessmentProcessCancellationNominator template ID to customize the message that rater nominators receive when a performance assessment is canceled.</td>
</tr>
<tr>
<td>AssessmentProcessCancellationReviewer</td>
<td>You can use the AssessmentProcessCancellationReviewer template ID to customize the message that reviewers receive when a performance assessment is canceled.</td>
</tr>
<tr>
<td>This Template ID</td>
<td>Is Used as Follows</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>AssessmentProcessExternalAssessor</td>
<td>You can use the AssessmentProcessExternalAssessor template ID to customize the message that external raters receive when they’re assigned to an assessment.</td>
</tr>
<tr>
<td>AssessmentProcessInternalAssessor</td>
<td>You can use the AssessmentProcessInternalAssessor template ID to customize the message that internal assessors receive when they’re assigned to an assessment.</td>
</tr>
<tr>
<td>AssessmentProcessNominatorRescheduled</td>
<td>You can use the AssessmentProcessNominatorRescheduled template ID to customize the message that nominators receive when the start date for their assigned assessment changes.</td>
</tr>
<tr>
<td>AssessmentProcessNominatorStart</td>
<td>You can use the AssessmentProcessReviewer template ID to customize the message that a nominator receives when he or she is designated to select raters for one or more performance assessments.</td>
</tr>
<tr>
<td>AssessmentProcessReviewer</td>
<td>You can use the AssessmentProcessReviewer template ID to customize the message that a reviewer receives when he or she is assigned to an assessment.</td>
</tr>
</tbody>
</table>

### 2.13.3 Background Job Templates

Use Background Job templates to customize the email messages that the system sends to individuals when a background job is completed, when a background job report is available, or after a recurring report is created.

Background job notifications are sent, usually to administrators, when they run a job in the background. For example, when an administrator propagates an assignment profile, that is a background job. Most customers use the default template for these notifications because they are utilities.

<table>
<thead>
<tr>
<th>This Notification Template</th>
<th>Is Used as Follows</th>
</tr>
</thead>
<tbody>
<tr>
<td>BackgroundJobNotification</td>
<td>You can use the BackgroundJobNotification template ID to edit the message that an administrator receives when a background job is completed.</td>
</tr>
<tr>
<td>BackgroundReportJobNotification</td>
<td>You can use the BackgroundReportJobNotification template ID to customize the message that an administrator receives when a background job is completed and the background job report is available.</td>
</tr>
</tbody>
</table>
### 2.13.4 Catalog Items and Pricing Templates

Use Catalog Items and Pricing templates to customize the email messages that the system sends to individuals when an item in a catalog expires or will expire soon.

Catalog items and pricing template notifications are utilities, so most companies do not customize them.

<table>
<thead>
<tr>
<th>This Notification Template</th>
<th>Is Used as follows</th>
</tr>
</thead>
<tbody>
<tr>
<td>ExpiredCatalogItemsNotification</td>
<td>You can use the ExpiredCatalogItemsNotification template ID to customize the message that an administrator receives when one or more expired items are removed from a catalog.</td>
</tr>
<tr>
<td>PRE_EXPIRATION_FOR_CATALOG_ITEMS</td>
<td>You can use the PreExpirationNotificationForCatalogItems template ID to customize the message that an administrator receives when one or more items in a catalog will expire soon.</td>
</tr>
</tbody>
</table>

### 2.13.5 Learning Plan Templates

Use Learning Plan templates to customize the email messages that the system sends to individuals when a learning plan event is completed or when the recipient must complete a task. The Learning Plan templates include enrollment slots, user plans, and password requests.

<table>
<thead>
<tr>
<th>This Email Notification Template</th>
<th>Is Used as follows</th>
</tr>
</thead>
<tbody>
<tr>
<td>CareerPlannerTargetJobPositionChange</td>
<td>You can use the CareerPlannerTargetJobPositionChange template ID to customize the message that a manager receives when users change their targeted job position.</td>
</tr>
<tr>
<td>CERTIFICATE_OF_COMPLETION</td>
<td>You can use the CERTIFICATE_OF_COMPLETION template ID to customize the message that users receive when they complete an item.</td>
</tr>
<tr>
<td>EnrollmentSlotCancellation</td>
<td>You can use the EnrollmentSlotCancellation template ID to customize the message that users receive when a class in which they’re enrolled is canceled.</td>
</tr>
<tr>
<td>EnrollmentSlotChangeConfirmation</td>
<td>You can use the EnrollmentSlotChangeConfirmation template ID to customize the message that an administrator receives when a class reserved seat is modified.</td>
</tr>
<tr>
<td>EnrollmentSlotConfirmation</td>
<td>You can use the EnrollmentSlotConfirmation template ID to customize the message that the organization e-mail recipient receives after an administrator adds a reserved seat to a class.</td>
</tr>
<tr>
<td>This Email Notification Template</td>
<td>Is Used as Follows</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ESigPinExpiredNotification</td>
<td>You can use the ESigPinExpiredNotification template ID to customize the message that users receive when they try to log in with an expired PIN.</td>
</tr>
<tr>
<td>ESigPinFailedNotification</td>
<td>You can use the ESigPinFailedNotification template ID to customize the message that an administrator receives when a user can’t add learning history because their PIN fails.</td>
</tr>
<tr>
<td>IDPApproval</td>
<td>You can use the IDPApproval template ID to customize the message that users receive when their development plan is approved.</td>
</tr>
<tr>
<td>IDPApprovalCancelledBySystem</td>
<td>You can use the IDPApprovalCancelledBySystem template ID to customize the message that users receive when their development plan is canceled because the manager is replaced.</td>
</tr>
<tr>
<td>IDPApprovalRequest</td>
<td>You can use the IDPApprovalRequest template ID to customize the message that a manager receives when a user submits a plan.</td>
</tr>
<tr>
<td>IDPExpiration</td>
<td>You can use the IDPExpiration template ID to customize the message that a user receives when a plan reaches its expiration date.</td>
</tr>
<tr>
<td>IDPExpirationNotification</td>
<td>You can use the IDPExpirationNotification template ID to customize the message that a user receives when a plan approaches its expiration date.</td>
</tr>
<tr>
<td>IDPInactiveApproval</td>
<td>You can use the IDPInactiveApproval template ID to customize the message that a user receives when a plan is approved before its effective date. The plan remains inactive until it reaches its effective date.</td>
</tr>
<tr>
<td>IDPNote</td>
<td>You can use the IDPNote template ID to customize the message that users receive when a manager or coach adds a note to their plan.</td>
</tr>
<tr>
<td>IDPR eject</td>
<td>You can use the IDPR eject template ID to customize the message that users receive when the approver has rejected the user’s development plan.</td>
</tr>
<tr>
<td>PasswordNotification</td>
<td>You can use the PasswordNotification template ID to customize the message that users receive when they request their password or when an administrator creates a new user entity and the enableRandomPasswordGenerationForNewUsers property in the LMS_Admin configuration ID is set to true.</td>
</tr>
</tbody>
</table>
This Email Notification Template Is Used as Follows

ReassignStudentComponentNotification You can use the ReassignStudentComponentNotification template ID to customize a message that users receive when they’re reassigned to a new item.

2.13.6 Approval Processes Templates

Edit approval processes templates if you have set up an approval process for users to enroll into courses, withdraw from courses, and so on.

Note

This list contains some deprecated Plateau Performance templates that have not yet been removed from the system.

Who Receives Messages and When

<table>
<thead>
<tr>
<th>Notification Template</th>
<th>Who Receives Messages and When</th>
</tr>
</thead>
<tbody>
<tr>
<td>ApprovalProcessApprovalProgressed</td>
<td>Users receive ApprovalProcessApprovalProgressed messages when a step in the approval process is completed.</td>
</tr>
<tr>
<td>ApprovalProcessApprovalRequired</td>
<td>Approvers receive ApprovalProcessApprovalRequired messages when an approval process begins.</td>
</tr>
<tr>
<td>ApprovalProcessApprovalWithdrawn</td>
<td>Users receive ApprovalProcessApprovalWithdrawn messages when an administrator withdraws their request for external training (external learning request).</td>
</tr>
<tr>
<td>ApprovalProcessInitialRequest</td>
<td>Users receive ApprovalProcessInitialRequest messages when an approval process begins.</td>
</tr>
<tr>
<td>ApprovalProcessRequestApproved</td>
<td>Users receive ApprovalProcessRequestApproved messages when a request for an item or class is granted.</td>
</tr>
<tr>
<td>ApprovalProcessRequestDenied</td>
<td>Users receive ApprovalProcessRequestDenied messages when a request for an item or class is denied.</td>
</tr>
<tr>
<td>ApprovalProcessRequestExpired</td>
<td>Users receive ApprovalProcessRequestExpired messages when a step in the approval process is completed.</td>
</tr>
<tr>
<td>ExternalVerificationReminder</td>
<td>Approvers receive ExternalVerificationReminder when users complete an external learning activity.</td>
</tr>
<tr>
<td>ExternalLearningRequestApprovalRequired</td>
<td>Approvers receive ExternalLearningRequestApprovalRequired messages when a user or administrator submits an external training request form.</td>
</tr>
<tr>
<td>Notification Template</td>
<td>Who Receives Messages and When</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ExternalLearningRequestVerificationRequired</td>
<td>Approvers receive ExternalLearningRequestVerificationRequired messages when a class has occurred and a user or administrator submits an external training request for verification.</td>
</tr>
<tr>
<td>ReviewProcessReviewApproval</td>
<td>Approvers receive ReviewProcessReviewApproval messages when a review process requires his or her electronic signature.</td>
</tr>
<tr>
<td>ReviewProcessReviewApprovalDenied</td>
<td>Users receive ReviewProcessReviewApprovalDenied messages when a step in the approval process is completed and denied.</td>
</tr>
<tr>
<td>ReviewProcessReviewCreatedSupervisor</td>
<td>Supervisors receive ReviewProcessReviewCreatedSupervisor messages when they supervise an employee whose review is beginning.</td>
</tr>
<tr>
<td>ReviewProcessReviewDeadlinePassed</td>
<td>Supervisors receive ReviewProcessReviewDeadlinePassed messages when a review deadline has passed.</td>
</tr>
<tr>
<td>ReviewProcessReviewFeedbackRequired</td>
<td>Users receive ReviewProcessReviewFeedbackRequired messages when a supervisor designates the user as a feedback rater for a review.</td>
</tr>
<tr>
<td>ReviewProcessReviewPublished</td>
<td>Supervisors receive ReviewProcessReviewPublished messages when a review is completed, approved, and published.</td>
</tr>
<tr>
<td>ReviewProcessReviewReminder</td>
<td>Raters or approvers receive ReviewProcessReviewReminder messages when the rater or approver misses a deadline.</td>
</tr>
<tr>
<td>UserRecordedCompletionApprovalProcessRequestApproved</td>
<td>Sent to end-users when you enable an approval process for end-users to post learning events and when the process ends in an approval.</td>
</tr>
<tr>
<td>UserRecordedCompletionApprovalProcessRequestDenied</td>
<td>Sent to end-users when you enable an approval process for end-users to post learning events and when the process ends in a denial.</td>
</tr>
</tbody>
</table>
Notification Template | Who Receives Messages and When
--- | ---
UserRecordedCompletionApprovalProcessApprovalRequired | Sent to approvers when you enable an approval process for end-users to post learning events and when the approver is in the approval process. This notifies the approver that they need to take action on an approval.

2.13.7 Class Templates

Use Class templates to customize the email messages that the system sends to individuals when users enroll in or register for classes or when classes are canceled.

i Note
Class templates are among the most customized because they notify your users about scheduled courses and help them manage their calendars.

This Template | Is Used as Follows
--- | ---
SystemEnrollmentNotification | You can use the SystemEnrollmentNotification template ID to customize the message that a user, manager, and instructor receive when the user registers in a class or when a manager or administrator registers the user in a class.

SystemScheduleCancellationNotification | You can use the SystemScheduleCancellationNotification template ID to customize the message that a user, manager, and instructor receive when a class is canceled.

SystemUnenrollmentNotification | You can use the SystemUnenrollmentNotification template ID to customize the message that a user, manager, and instructor receive when the user withdraws from a class or when an administrator withdraws the user from a class.

SystemWaitlistNotification | You can use the SystemWaitlistNotification template ID to customize the message that a user, manager, and instructor receive when the user registers for waitlist status, or when an administrator registers the user for waitlist status, for a class.

SystemWaitlistRemovalNotification | You can use the SystemWaitlistRemovalNotification template ID to customize the message that a waitlisted user, a manager, and an instructor receive when an administrator or the system enrolls the waitlisted user in a class.
2.13.8 VLS Attendance Processing Templates

If you’re using virtual learning to conduct training in WebEx, Adobe Connector or Microsoft Skype for Business rooms, you might edit the VLS attendance processing templates.

⚠️ Caution
Attendance processing doesn’t work with all meeting rooms. Check your configuration.

<table>
<thead>
<tr>
<th>This Template</th>
<th>Is Used as Follows</th>
</tr>
</thead>
<tbody>
<tr>
<td>VLE_ENROLLMENT</td>
<td>You can use the VLE_ENROLLMENT template ID to customize the message that users receive when they’re enrolled in a class that has a VLS component.</td>
</tr>
<tr>
<td>VLE_EVENT_CREATION</td>
<td>You can use the VLE_EVENT_CREATION template ID to customize the message that an instructor receives when a VLS server value is applied to a class.</td>
</tr>
<tr>
<td>VLE_EVENT_DELETION</td>
<td>You can use the VLE_EVENT_DELETION template ID to customize the message that an instructor and a learner receives when a VLS server value is removed from a class. This helps them to update their calendars if they have the VLS link information.</td>
</tr>
<tr>
<td>VLE_EVENT_UPDATE</td>
<td>You can use the VLE_EVENT_UPDATE template ID to customize the message that an instructor receives when the VLS time frame in a class changes.</td>
</tr>
<tr>
<td>VLE_EVENT_UPDATE_STUDENTS</td>
<td>You can use the VLE_EVENT_UPDATE_STUDENTS template ID to customize the message that users receive when the VLS time frame in a class changes.</td>
</tr>
<tr>
<td>VLE_UNENROLLMENT</td>
<td>You can use the VLE_UNENROLLMENT template ID to customize the message that a user receives when he or she is unenrolled from a class that has a VLS component.</td>
</tr>
</tbody>
</table>
### 2.13.9 Miscellaneous Templates

We’ve grouped the notification templates that don’t fall easily into another category of notification templates into this section. Individuals receive these notifications for a variety of reasons.

<table>
<thead>
<tr>
<th>This Template</th>
<th>Is Used as Follows</th>
</tr>
</thead>
<tbody>
<tr>
<td>AlternateSubordinateNotification</td>
<td>You can use the AlternateSubordinateNotification template ID to customize the message that users receive when they’re assigned to a new, alternate manager.</td>
</tr>
<tr>
<td>AlternateSupervisorNotification</td>
<td>You can use the AlternateSupervisorNotification template ID to customize the message that users receive when they’re assigned as an alternate manager for another user.</td>
</tr>
<tr>
<td>DelegateeEmail</td>
<td>To inform users that they’ve been identified as a delegate, the system uses the DelegationAssignment template ID. To inform delegated users that they have something to complete on behalf of user who identified them as a delegate (called a delegator), then system uses the DelegateeEmail template ID. For example, if the delegator makes the delegate responsible for completing performance reviews, then the system:</td>
</tr>
<tr>
<td></td>
<td>• Sends any original message that you’ve configured for performance reviews to the delegator.</td>
</tr>
<tr>
<td></td>
<td>• Sends a message to the delegate that explains that the delegate has been identified to act on behalf of the delegator and 2) embeds a copy of the original message (so that the delegate knows what to complete) that the system sent to the delegator.</td>
</tr>
<tr>
<td>DelegationAssignment</td>
<td>You can use the DelegationAssignment template ID to customize the message that a delegate receives. The system sends this message for a simple reason: to notify delegates that they’ve been selected to act on behalf of another user <strong>at some time in the future</strong>. When a delegate needs to take a specific action, the system sends another message, using the DelegateeEmail template ID.</td>
</tr>
<tr>
<td>SELF_REGISTRATION_ADMIN</td>
<td>You can use the SELF_REGISTRATION_ADMIN template ID to customize the message that an administrator receives when a user creates a new account.</td>
</tr>
<tr>
<td>SELF_REGISTRATION_STUDENT</td>
<td>You can use the SELF_REGISTRATION_STUDENT template ID to customize the message that a user receives when he or she creates a new account.</td>
</tr>
<tr>
<td>UserTalentProfileExpired</td>
<td>You can use the UserTalentProfileExpired template ID to customize the message that users, with their managers, receive when users are assigned a new survey.</td>
</tr>
</tbody>
</table>
### This Template

| ObserverNotification | This notification is sent when a user requests an observer for a task checklist. The nominated observer receives the notification. |

---

### 2.14 Notification Tags Available in Ad Hoc Notifications

You can use only “user” syntax tag IDs with an ad hoc notification; that is, you can’t use all of the syntax tag IDs associated with the notification template ID that you’re using to base the ad hoc notification unless those syntax tag IDs are also part of the user-specific syntax tag IDs. Therefore, you must delete the non-user specific syntax IDs; otherwise, the syntax tag will appear as blank in the notification. For example, if you include the text “The Job ID is: `<JOB_ID/>`.” (where there’s no value) when you are creating an ad hoc notification message, the user receives the following text: “The Job ID is: .”

<table>
<thead>
<tr>
<th>Syntax Tag IDs</th>
<th>Where the tag can be used</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&lt;STUD_ID/&gt;</code> (User ID)</td>
<td>Any ad hoc notification</td>
</tr>
<tr>
<td><code>&lt;STUD_NAME/&gt;</code> (User Name)</td>
<td>Any ad hoc notification</td>
</tr>
<tr>
<td><code>&lt;STUD_ORG/&gt;</code> (User organization)</td>
<td>Any ad hoc notification</td>
</tr>
<tr>
<td><code>&lt;STUD_DMN/&gt;</code> (User domain)</td>
<td>Any ad hoc notification</td>
</tr>
<tr>
<td><code>&lt;CPNT_ID/&gt;</code> (Item ID)</td>
<td>Class record</td>
</tr>
<tr>
<td><code>&lt;CPNT_TITLE/&gt;</code> (Item Title)</td>
<td>Class Record</td>
</tr>
<tr>
<td><code>&lt;CPNT_DESC/&gt;</code> (Item Description)</td>
<td>Class record</td>
</tr>
<tr>
<td><code>&lt;SCHD_DESC/&gt;</code> (Class Description)</td>
<td>Class record</td>
</tr>
<tr>
<td>Syntax Tag IDs</td>
<td>Where the tag can be used</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><code>&lt;SCHD_SEGM/&gt;</code> (List of all segments in the scheduled offering)</td>
<td>- Users &gt; Tools &gt; Send Notifications (only for Item, Schedule Offering, Curricula, Class)</td>
</tr>
<tr>
<td></td>
<td>- Registration tab for a scheduled offering</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Registration</td>
</tr>
<tr>
<td></td>
<td>- Learning &gt; Tools &gt; Scheduled Offering &gt; Notifications</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Select a Class &gt; Action</td>
</tr>
<tr>
<td><code>&lt;SCHD_ID/&gt;</code> (Schedule ID)</td>
<td>- Users &gt; Tools &gt; Send Notifications (only for Item, Schedule Offering, Curricula, Class)</td>
</tr>
<tr>
<td></td>
<td>- Registration tab for a scheduled offering</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Registration</td>
</tr>
<tr>
<td></td>
<td>- Learning &gt; Tools &gt; Scheduled Offering &gt; Notifications</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Select a Class &gt; Action</td>
</tr>
<tr>
<td><code>&lt;&amp;SCHD-CPNT&gt;</code> (Schedule Component)</td>
<td>- Users &gt; Tools &gt; Send Notifications (only for Item, Schedule Offering, Curricula, Class)</td>
</tr>
<tr>
<td></td>
<td>- Registration tab for a scheduled offering</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Registration</td>
</tr>
<tr>
<td></td>
<td>- Learning &gt; Tools &gt; Scheduled Offering &gt; Notifications</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Select a Class &gt; Action</td>
</tr>
<tr>
<td><code>&lt;&amp;SEG-GRID&gt;</code> (Scheduled Offering Segment Grid)</td>
<td>- Users &gt; Tools &gt; Send Notifications</td>
</tr>
<tr>
<td></td>
<td>- Registration tab for a scheduled offering</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Registration</td>
</tr>
<tr>
<td></td>
<td>- Learning &gt; Tools &gt; Scheduled Offering &gt; Notifications</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Select a Class &gt; Action</td>
</tr>
<tr>
<td><code>&lt;&amp;SCHED-INSTRUCTIONS/&gt;</code> (Scheduled Offering Registration Text)</td>
<td>- Users &gt; Tools &gt; Send Notifications (only for Item, Schedule Offering, Curricula, Class)</td>
</tr>
<tr>
<td></td>
<td>- Registration tab for a scheduled offering</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Registration</td>
</tr>
<tr>
<td></td>
<td>- Learning &gt; Tools &gt; Scheduled Offering &gt; Notifications</td>
</tr>
<tr>
<td></td>
<td>- Learning Activities &gt; Classes &gt; Select a Class &gt; Action</td>
</tr>
</tbody>
</table>
### Syntax Tag IDs

<table>
<thead>
<tr>
<th>Tag</th>
<th>Where the tag can be used</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&amp;SEG-FACILITY&gt;</code> (Segment Facility)</td>
<td></td>
</tr>
</tbody>
</table>
  ▶️ **Users** ▶️ **Tools** ▶️ **Send Notifications** (only for Item, Schedule Offering, Curricula, Class)  
  Registration tab for a scheduled offering  
  ▶️ **Learning Activities** ▶️ **Classes** ▶️ **Registration**  
  ▶️ **Learning** ▶️ **Tools** ▶️ **Scheduled Offering** ▶️ **Notifications**  
  ▶️ **Learning Activities** ▶️ **Classes** ▶️ **Select a Class** ▶️ **Action** |
| `&SCHD-DESC-EDITABLE>` (Scheduled Description Editable) |  
  ▶️ **Users** ▶️ **Tools** ▶️ **Send Notifications** (only for Item, Schedule Offering, Curricula, Class)  
  Registration tab for a scheduled offering  
  ▶️ **Learning Activities** ▶️ **Classes** ▶️ **Registration**  
  ▶️ **Learning** ▶️ **Tools** ▶️ **Scheduled Offering** ▶️ **Notifications**  
  ▶️ **Learning Activities** ▶️ **Classes** ▶️ **Select a Class** ▶️ **Action** |

### Related Information

The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 52]

### 2.15 Template ID to Trigger to Receiver Map

Use this map to understand who receives an email, what triggers the email to be sent, and what template ID the system uses to format the email.

**Template, Trigger, and Receiver Map**

<table>
<thead>
<tr>
<th>Template ID</th>
<th>Trigger</th>
<th>Recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>AlternateSubordinateNotification</td>
<td>A manager or an administrator assigns a user to be an alternate manager.</td>
<td>The user who has been assigned to a new, alternate manager.</td>
</tr>
<tr>
<td>AlternateSupervisorNotification</td>
<td>A manager or an administrator assigns a user to be an alternate manager.</td>
<td>The user who was assigned to the alternate manager</td>
</tr>
<tr>
<td>ApmAdminAssessmentReminder</td>
<td>Assessment Notification Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>Template ID</td>
<td>Trigger</td>
<td>Recipients</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ApmAttachmentQuotaWatch</td>
<td>The combined size of the attachments in the system equals or exceeds the percentage in the Utilization Threshold box (System Administration &gt; Automatic Processes &gt; Exceeded Attachment Space Email Notification) multiplied by the value of the totalAttachmentsSpaceAllocatedKB property in the ATTACHMENT configuration ID (System Administration &gt; Configuration System Configuration).</td>
<td>The email address identified by the automatic process.</td>
</tr>
<tr>
<td>ApmComponentRequest</td>
<td>Item Scheduling Demand Automatic Process</td>
<td>The email address identified by the automatic process.</td>
</tr>
<tr>
<td></td>
<td>Contact email at item entity level</td>
<td>Contact email at item entity level</td>
</tr>
<tr>
<td>ApmCoupon_expiry</td>
<td>When the value in the Valid To date box (Finance &gt; Coupons &gt; Coupon Details) of the coupon entity falls within the threshold you set in the Expiration Email Notification Threshold area for the Coupon Expiration Email Notification automatic process (System Administration &gt; Automatic Processes &gt; Coupon Expiration Email Notification).</td>
<td>the person whose email address is in the Owner Email box (Finance &gt; Coupons &gt; Coupon Details) of the expiring coupon entity.</td>
</tr>
<tr>
<td>ApmExternalAssessmentReminder</td>
<td>Assessment Notification Automatic Process</td>
<td>External raters</td>
</tr>
<tr>
<td>ApmInitiativeEmployeeNotification</td>
<td>Initiative Notification Automatic Process, if plan goal is aligned to an initiative that was modified</td>
<td>Users</td>
</tr>
<tr>
<td>ApmInitiativeOwnerNotification</td>
<td>Initiative Notification Automatic Process, if changes were made to published initiatives of the parent organization</td>
<td>Organization owner</td>
</tr>
<tr>
<td>ApmInitiativeRequiredReminder</td>
<td>Initiative Notification Automatic Process, if required initiatives were published to suborganizations and one or more suborganizations has failed to align by the target date</td>
<td>Organization owner</td>
</tr>
<tr>
<td>Template ID</td>
<td>Trigger</td>
<td>Recipients</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>ApmInstanceDelivery</td>
<td>Upcoming Class Reminder Email Notification Automatic Process</td>
<td>Users</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Managers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmLearnerAssessmentReminder</td>
<td>Assessment Notification Automatic Process</td>
<td>Assessment rater</td>
</tr>
<tr>
<td>ApmQualificationCleanup</td>
<td>Curriculum Cleanup Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmResetOnlineComponents</td>
<td>Reset Online Item Progress Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmReviewCouldNotStartContactError</td>
<td>Review Initiation Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmReviewInitiationContactError</td>
<td>Review Initiation Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmReviewInitiationSummary</td>
<td>Review Initiation Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmStudentLearningPlanNotification</td>
<td>Learning Plan Email Notification Automatic Process, if the user’s learning plan changes</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Users</td>
</tr>
<tr>
<td>ApmSupervisorLearningPlanNotification</td>
<td>Learning Plan Email Notification Automatic Process, when a user completes an item</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Managers</td>
</tr>
<tr>
<td>ApmSupervisorReviewIncompleteAssessment</td>
<td>Assessment Notification Automatic Process, if direct reports participating in a multirater assessment have overdue incomplete assessments</td>
<td>Managers</td>
</tr>
<tr>
<td>ApmSynchronizeStudentChangesAssignmentProfile</td>
<td>Assignment Profile Execute Updates Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmTrainingExpiration</td>
<td>Learning Expiration Email Notification Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Managers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Users</td>
</tr>
<tr>
<td>ApmUpdateCatalogPrice</td>
<td>Change Library Price Email Notification Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>Template ID</td>
<td>Trigger</td>
<td>Recipients</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------------------------------------------------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>ApmUserRequestedSONotification</td>
<td>Class Request Demand Met Email Notification Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmVlsAttendanceProcessing</td>
<td>Process VLS Attendance Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ApmWaitlistRequest</td>
<td>Move Users from Waitlist to Request List Automatic Process</td>
<td>The email address identified by the automatic process, Users, managers</td>
</tr>
<tr>
<td>ApprovalProcessApprovalProgressed</td>
<td>Approval process new step reached</td>
<td>Users</td>
</tr>
<tr>
<td>ApprovalProcessApprovalRequired</td>
<td>Approval process initiated</td>
<td>Requested approver</td>
</tr>
<tr>
<td>ApprovalProcessApprovalWithdrawn</td>
<td>Approval request withdrawn</td>
<td>Users</td>
</tr>
<tr>
<td>ApprovalProcessInitialRequest</td>
<td>Approval process initiated</td>
<td>Users</td>
</tr>
<tr>
<td>ApprovalProcessRequestApproved</td>
<td>Approval granted</td>
<td>Users</td>
</tr>
<tr>
<td>ApprovalProcessRequestDenied</td>
<td>Approval denied</td>
<td>Users</td>
</tr>
<tr>
<td>ApprovalProcessRequestExpired</td>
<td>The due date for an approval of an external learning request passes.</td>
<td>Users</td>
</tr>
<tr>
<td>AssessmentProcessAdministrator</td>
<td>Assessment Notification Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>AssessmentProcessAssessorApprover</td>
<td>Assessment Notification Automatic Process</td>
<td>Rater nomination approver</td>
</tr>
<tr>
<td>AssessmentProcessAssessorRemoved</td>
<td>Assessment Notification Automatic Process</td>
<td>Rater when the rater is removed from the assessment process</td>
</tr>
<tr>
<td>AssessmentProcessAssessorsRejected</td>
<td>Assessment Notification Automatic Process, if the nominated rater isn’t approved</td>
<td>Rater nominator</td>
</tr>
<tr>
<td>AssessmentProcessCancellationAsses-</td>
<td>Assessment Notification Automatic Process, if the assessment is canceled</td>
<td>Rater</td>
</tr>
<tr>
<td>sor</td>
<td>AssessmentNotificationAutomaticProcess,iftheassessmentiscanceled</td>
<td>Rater nomination approver</td>
</tr>
<tr>
<td>AssessmentProcessCancellationAsses-</td>
<td>AssessmentNotificationAutomaticProcess,iftheassessmentiscanceled</td>
<td>Rater nominator</td>
</tr>
<tr>
<td>sorApprover</td>
<td>AssessmentNotificationAutomaticProcess,iftheassessmentiscanceled</td>
<td>Rater nominator</td>
</tr>
<tr>
<td>Template ID</td>
<td>Trigger</td>
<td>Recipients</td>
</tr>
<tr>
<td>------------</td>
<td>-------------------------------------------------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>AssessmentProcessCancellationReviewer</td>
<td>Assessment Notification Automatic Process, if the review option was enabled and the assessment is canceled</td>
<td>Managers</td>
</tr>
<tr>
<td>AssessmentProcessExternalAssessor</td>
<td>Assessment Notification Automatic Process</td>
<td>External raters</td>
</tr>
<tr>
<td>AssessmentProcessInternalAssessor</td>
<td>Assessment Notification Automatic Process</td>
<td>Rater</td>
</tr>
<tr>
<td>AssessmentProcessNominatorRescheduled</td>
<td>Assessment Notification Automatic Process, if assessment start date changes</td>
<td>Rater nominator</td>
</tr>
<tr>
<td>AssessmentProcessNominatorStart</td>
<td>Assessment Notification Automatic Process</td>
<td>Rater nominator</td>
</tr>
<tr>
<td>AssessmentProcessReviewer</td>
<td>Assessment Notification Automatic Process, if the review option was enabled</td>
<td>Managers</td>
</tr>
<tr>
<td>BackgroundJobNotification</td>
<td>Background job complete</td>
<td>Background job email (administrator entered)</td>
</tr>
<tr>
<td>BackgroundReportJobNotification</td>
<td>Background report job complete</td>
<td>Background report job email (administrator entered)</td>
</tr>
<tr>
<td>CancelCompensationCycle</td>
<td>The status of a compensation cycle changes to Cancelled</td>
<td>All compensation managers who have users who are eligible for that cycle</td>
</tr>
<tr>
<td>CareerPlannerTargetJobPositionChange</td>
<td>User changes targeted job position</td>
<td>Managers</td>
</tr>
<tr>
<td>CERTIFICATE_OF_COMPLETION</td>
<td>History record added, administrator email certificate</td>
<td>Users</td>
</tr>
<tr>
<td>DelegateeEmail</td>
<td>If a user (called a delegator) identifies another user to act as a delegate, then the system generates this notification when the delegator is set to receive a notification for one of the permissions that was granted to the delegate.</td>
<td>A delegated user</td>
</tr>
<tr>
<td>DelegationAssignment</td>
<td>When a user identifies another user to act as a delegate, changes one or more permissions for an existing delegate, orreactivates delegated permissions</td>
<td>A delegated user</td>
</tr>
<tr>
<td>EnrollmentSlotCancellation</td>
<td>Seats removed from class</td>
<td>Organization email</td>
</tr>
<tr>
<td>EnrollmentSlotChangeConfirmation</td>
<td>Seats changed on class</td>
<td>Organization email</td>
</tr>
</tbody>
</table>

Customizing Notifications in the Notification Editor
<table>
<thead>
<tr>
<th>Template ID</th>
<th>Trigger</th>
<th>Recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>EnrollmentSlotConfirmation</td>
<td>Seats created for class</td>
<td>Organization email</td>
</tr>
<tr>
<td>ESigPinExpiredNotification</td>
<td>E-signature expiration</td>
<td>Users</td>
</tr>
<tr>
<td>ESigPinFailedNotification</td>
<td>E-signature verification unsuccessful</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td>ExpiredCatalogItemsNotification</td>
<td>Purge Expired Library Items Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The email address identified by the library</td>
</tr>
<tr>
<td>ExternalLearningRequestApprovalRequired</td>
<td>A user or administrator submits an external training request form</td>
<td>Approver</td>
</tr>
<tr>
<td>ExternalLearningRequestVerificationRequired</td>
<td>A class has occurred and a user or administrator submits an external training request for verification</td>
<td>Approver</td>
</tr>
<tr>
<td>ExternalVerificationReminder</td>
<td>User completes an external learning activity</td>
<td>Approver</td>
</tr>
<tr>
<td>FollowupEvaluationAssignmentNotification</td>
<td>This notification is triggered in one of these ways:</td>
<td>Managers</td>
</tr>
<tr>
<td></td>
<td>● The Evaluation Synchronize Automatic Process Manager (APM) runs and finds assignments to be made according to your configuration.</td>
<td>A substitute for the manager if the survey is reassigned.</td>
</tr>
<tr>
<td></td>
<td>● An end user reassigns the survey from the To Do panel. In this case, the substitute specified receives the notification.</td>
<td></td>
</tr>
<tr>
<td>IDPApproval</td>
<td>User plan is approved</td>
<td>Users</td>
</tr>
<tr>
<td>IDPApprovalCancelledBySystem</td>
<td>User’s manager changed while plan was awaiting approval</td>
<td>Users</td>
</tr>
<tr>
<td>IDPApprovalRequest</td>
<td>User submits plan for approval</td>
<td>Managers</td>
</tr>
<tr>
<td>IDPExpiration</td>
<td>User plan expired (expiration date reached and Expired Plans Automatic Process runs)</td>
<td>Users</td>
</tr>
<tr>
<td>IDPExpirationNotification</td>
<td>User plan about to expire (plan template expiration threshold reached)</td>
<td>Users</td>
</tr>
<tr>
<td>Template ID</td>
<td>Trigger</td>
<td>Recipients</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>IDPInactiveApproval</td>
<td>Inactive plan (effective date in the future) was approved</td>
<td>Users</td>
</tr>
<tr>
<td>IDPNote</td>
<td>Note added to plan by manager or coach. Plan Note Automatic Process runs.</td>
<td>Users</td>
</tr>
<tr>
<td>IDPReject</td>
<td>Plan rejected</td>
<td>Users</td>
</tr>
</tbody>
</table>
| InstructorAssignmentNotification | • Administrator goes to Learning Activities > Classes > Add New, assigns instructors, and selects Notify Instructor.  
• Administrator goes to Learning Activities > Classes, opens the class, then clicks Notify Instructors. | Instructors         |
| ItemEvaluationAssignmentNotification | Users are assigned a new survey. Assignment occurs in one of two ways:  
• When a learning event is posted through the learning event recorder for the learning item with the survey: a user completes the course and the completion is entered into the system.  
• An administrator goes to the Actions menu of the class and clicks Initiate Evaluations. | Users               |
<p>| JamGroupInvitation      | When an administrator sets one of the available invitation settings while associating an item with a Jam group Learning Activities &gt; Items &gt; Jam Groups. | Users who meet the invitation setting criteria. |
| ObserverNotification    | User requests observation of a task checklist.                            | The nominated observer |
| PasswordNotification    | User requests a new password or when an administrator creates a new user entity and the enableRandomPasswordGenerationForNewUsers property in the LMS_ADMIN configuration ID (System Administration &gt; Configuration &gt; System Configuration) is set to true. | Users               |</p>
<table>
<thead>
<tr>
<th>Template ID</th>
<th>Trigger</th>
<th>Recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>PreExpirationNotificationForCatalogItems</td>
<td>Purge Expired Library Items Automatic Process</td>
<td>The email address identified by the automatic process</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The email address identified by the library</td>
</tr>
<tr>
<td>PublishCompensationCycle</td>
<td>The status of a compensation cycle changes to Published</td>
<td>All compensation managers who have users who are eligible for that cycle</td>
</tr>
<tr>
<td>ReassignStudentComponentNotification</td>
<td>User reassigned item</td>
<td>Users</td>
</tr>
<tr>
<td>ReroutedWorksheetRecommendationOverridden</td>
<td>A compensation recommendation is overridden on a worksheet that has been rerouted</td>
<td>The compensation manager whose recommendation was overridden</td>
</tr>
<tr>
<td>ReturnWorksheet</td>
<td>A compensation manager returns a worksheet to the compensation manager who submitted it</td>
<td>The compensation manager who submitted the worksheet that is being returned</td>
</tr>
<tr>
<td>ReturnWorksheetToRerouteManager</td>
<td>Worksheet has been returned by a manager</td>
<td>Rerouted Compensation Manager whose worksheet has been returned</td>
</tr>
<tr>
<td>ReviewCompensationCycle</td>
<td>A compensation cycle enters the Review phase</td>
<td>All compensation managers who have users who are eligible for that cycle</td>
</tr>
<tr>
<td>ReviewProcessReviewApproval</td>
<td>Review sent for approval / signature. (&quot;notify approver&quot; option set at review process level.)</td>
<td>Approver for the current step</td>
</tr>
<tr>
<td>ReviewProcessReviewApprovalDenied</td>
<td>An approver clicks Deny in the user interface during the performance review approval process.</td>
<td>Managers</td>
</tr>
<tr>
<td>ReviewProcessReviewCreatedEmployee</td>
<td>Review initiated for user</td>
<td>Users</td>
</tr>
<tr>
<td>ReviewProcessReviewCreatedSupervisor</td>
<td>Review initiated for user</td>
<td>Managers</td>
</tr>
<tr>
<td>ReviewProcessReviewDeadlinePassed</td>
<td>Review is past due (send for signature; deadline is in the past).</td>
<td>Managers</td>
</tr>
<tr>
<td>ReviewProcessReviewFeedbackRequired</td>
<td>Feedback rater selected by manager</td>
<td>Feedback rater</td>
</tr>
<tr>
<td>ReviewProcessReviewNeeded</td>
<td>Review initiated (trigger option is ongoing and “notify only” selected). Allow manager initiated review.</td>
<td>Managers</td>
</tr>
<tr>
<td>ReviewProcessReviewPublished</td>
<td>Review completed, approved, and published.</td>
<td>Users</td>
</tr>
<tr>
<td>Template ID</td>
<td>Trigger</td>
<td>Recipients</td>
</tr>
<tr>
<td>------------</td>
<td>---------</td>
<td>------------</td>
</tr>
<tr>
<td>ReviewProcessReviewReminder</td>
<td>Review initiated; awaiting user / manager action. (“reminder” email is enabled at the review process level.)</td>
<td>Managers, Users (user to whom the reviewed is currently assigned)</td>
</tr>
<tr>
<td>ReviewProcessReviewSubmittedEmployee</td>
<td>Review submitted by manager. Awaiting user action. (“notify user / manager when a new step in the process is reached” is enabled at the review process level.)</td>
<td>Users</td>
</tr>
<tr>
<td>ReviewProcessReviewSubmittedSupervisor</td>
<td>Review submitted by user. Awaiting manager action. (“notify user / manager when a new step in the process is reached” is enabled at the review process level.)</td>
<td>Managers</td>
</tr>
</tbody>
</table>
| SELF_REGISTRATION_ADMIN | Users who are administrators and who create their own accounts | Administrator notification e-mail |}

- [System Administration](#)
- [Configuration](#)
- [Global Application](#)
- [Settings](#)
<p>| SELF_REGISTRATION_STUDENT | Users who create their own accounts | Users |
| StartCompensationCycle | The status of a compensation cycle changes to Started | All compensation managers who have users who are eligible for that cycle |
| SubmitWorksheet | A subordinate compensation manager submits a worksheet | The “ascendant” compensation manager |
| SubmitWorksheetReminder | An administrator selects the Notify check box for one or more compensation cycle managers (<a href="#">Users</a> Compensation Cycle Managers), clicks <a href="#">Send Notification</a>, and selects the SubmitWorksheetReminder template ID as the email template for the ad hoc notification. | All compensation managers who were selected by the administrator to receive the ad hoc notification |
| SubmitWorksheetReroutedManager | A subordinate compensation manager submits a worksheet that has been rerouted to a new compensation manager | The new compensation manager |
| SuspendCompensationCycle | The status of a compensation cycle changes to Suspended; an administrator clicks <a href="#">Suspend</a> when viewing a cycle status | All compensation managers who have users who are eligible for that cycle |</p>
<table>
<thead>
<tr>
<th>Template ID</th>
<th>Trigger</th>
<th>Recipients</th>
</tr>
</thead>
<tbody>
<tr>
<td>SystemEnrollmentNotification</td>
<td>Administrator, manager, or user (self-registration) registers the user in a class</td>
<td>Contacts, Instructor, Managers, Users. The administrator can choose the recipients. However, if the user self-registers, then all groups are notified.</td>
</tr>
<tr>
<td>SystemPendingEnrollmentNotification</td>
<td>User self-registers in a class with an approval process SystemPendingEnrollmentNotification will be suppressed when the Approval-ProcessInitialRequest notification is sent.</td>
<td>Contacts, Instructor, Managers, Users.</td>
</tr>
<tr>
<td>SystemScheduleCancellationNotification</td>
<td>Class cancellation</td>
<td>Contacts, Instructor, Managers, Users. The administrator can choose the recipients.</td>
</tr>
<tr>
<td>SystemUnenrollmentNotification</td>
<td>User or administrator withdraws the user from a class</td>
<td>Contacts, Instructor, Managers, Users. The administrator can choose the recipients. However, if the user self-withdraws, then all groups are notified.</td>
</tr>
<tr>
<td>SystemWaitlistNotification</td>
<td>User or administrator registers the user with a waitlist status.</td>
<td>Contacts, Instructor, Managers, Users. The administrator can choose the recipients. However, if the user self-registers, then all groups are notified.</td>
</tr>
<tr>
<td>Template ID</td>
<td>Trigger</td>
<td>Recipients</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>---------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SystemWaitlistRemovalNotification</td>
<td>Administrator changes the user’s waitlist status</td>
<td>Contacts, Instructor, Managers, Users. The administrator can choose the recipients. However, if the user is automatically registered through auto-fill, then all groups are notified.</td>
</tr>
<tr>
<td>VLE_ENROLLMENT</td>
<td>Users are enrolled in a class with a VLS component.</td>
<td>Users</td>
</tr>
<tr>
<td>VLE_EVENT_CREATION</td>
<td>Class time slot has VLS server applied to it.</td>
<td>Instructor</td>
</tr>
<tr>
<td>VLE_EVENT_DELETION</td>
<td>Class time slot has VLS server value removed.</td>
<td>Instructor</td>
</tr>
<tr>
<td>VLE_EVENT_UPDATE</td>
<td>Class time slot has modified VLS time frames.</td>
<td>Instructor</td>
</tr>
<tr>
<td>VLE_EVENT_UPDATE_STUDENTS</td>
<td>Class time slot has modified VLS time frames.</td>
<td>Users</td>
</tr>
<tr>
<td>VLE_UNENROLLMENT</td>
<td>Users are unenrolled from a class with a VLS component.</td>
<td>Users</td>
</tr>
<tr>
<td>WorksheetRecommendationOverridden</td>
<td>A compensation manager overrides a recommendation on a worksheet that was submitted to them and then submits the modified worksheet</td>
<td>The compensation manager whose recommendation was overridden</td>
</tr>
<tr>
<td>WorksheetRerouteManagerOriginal</td>
<td>An administrator reroutes a worksheet from the current (and now the former) compensation manager to a new compensation manager</td>
<td>The former compensation manager</td>
</tr>
<tr>
<td>WorksheetRerouteManagerReroute</td>
<td>An administrator reroutes a worksheet from the current (and now the former) compensation manager to a new compensation manager</td>
<td>The compensation manager receiving the rerouted worksheet</td>
</tr>
</tbody>
</table>
2.16 Notifications Sent by VLS Attendance Processing

The VLS Attendance Processing Automatic Process Manager (APM) sends these notifications.

The automatic process notifies the distribution list with the amount of VLS events that had attendance data successfully retrieved and the amount of learning events recorded. It also triggers the record learning event trigger, which sends its own emails.

**VLS Attendance Processing Notifications**

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>The email address identified in System Administration Automatic Processes Process VLS Attendance</td>
<td>To notify administrators about the success of the automatic process.</td>
</tr>
<tr>
<td>The contact associated with the class with the VLS Segment.</td>
<td>In addition to the information sent to the distribution list you identify here, the automatic process sends an email to the class contact about when the learning events were recorded.</td>
</tr>
<tr>
<td>Users who attended classes with VLS segments.</td>
<td>The VLS attendance processing automatic process sends notifications if it finds a user who has attended a session of the virtual classrooms in the past but the data for the VLS attendance has not been retrieved and recorded.</td>
</tr>
</tbody>
</table>

**Related Information**

- Template ID to Trigger to Receiver Map [page 68]
- Approval Processes Templates [page 61]
- VLS Attendance Processing Templates [page 64]

2.17 Legacy Notification Template Editor

The legacy SAP SuccessFactors Learning notification template editor can create notifications for your learning events.

When events occur in SAP SuccessFactors Learning, users of the system receive notifications. For example, when users are enrolled, they receive an enrollment notification email. The email that they receive is called a notification message.

**i Note**

Importantly, SAP SuccessFactors Learning notifications that are sent from templates are always email messages, as opposed to the web notifications in the header of the SAP SuccessFactors user interface.
Notification messages are generated from a notification template, which contains the words that the recipients see in their email messages. To edit the templates, you can use the legacy template editor or you can use the rich editing experience of the notification editor. We recommend that you use the notification editor because you can see what your notification look like when users receive it.

The legacy notification editor uses plain text, HTML (including direct links), syntax tags, and one or more attachments. To use it, understand field, merge, and looping strategies like Microsoft Word uses in mail merge. You also need to understand the code of HTML and how email messages are formatted for your organization.

2.17.1 Viewing Original Email Notification Templates

View original email notification templates when you want to return to the content that SAP SuccessFactors Learning delivered originally.

Context

If you edited email notification templates and you want to compare your changes to the original email notification template provided by SAP SuccessFactors Learning, you can view the original content. This can be useful, for example, if you edit the template and the edits aren’t working for you. View the content of the default template to start over from the original content as it was delivered on the first day of your implementation.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to System Administration >> Manage Email >> Email Notification Templates.
2. Search for and open the email notification template that you want to investigate.
3. Go to Messages and then click View Default.

2.17.2 Legacy Notification Templates Editor Sections

If you use the legacy notification templates editor, you should understand how to use its sections.

We continue to release the legacy notification templates editor to give customers time to adopt the new rich text notification editor. We recommend that you move to the new editing experience.

To find the legacy notification editor, go to SAP SuccessFactors Learning administration and then go to System Administration >> Manage Email >> Email Notification Templates. You see three sections.

- Summary: You can describe the template and you can define a notification syntax to be associated with the template.
• **Messages**: You can control the messages that are sent to different user groups who receive the message. Unless you’ve customized the notification system, you can define the subject and the body of the message. Each notification template can have multiple subjects and bodies depending on how the notification template functions. For example, if a notification template generates run-time messages to both users and supervisors, it might define one subject for users and one subject for supervisors. Click *Syntax Tags* to see the list of syntax tags that are allowed for this message.

• **Attachments**: You can define an attachment to be sent with the messages generated from the template at run time. The message ID and description don’t appear in the message, they are for system use only. The attachment is sent to users via the SMTP server at run time.

### 2.17.3 Using Locale Labels to Translate Notifications (Legacy Editor)

In the legacy SAP SuccessFactors Learning notification editor, labels store the actual words that users read in notifications, so they’re the lowest level of configuration and critical to translating your notifications.

⚠ **Caution**

If you’re using the rich text notification editor, this section does not apply to you.

You can use labels and locale labels (if your system supports a multi-language environment) to customize any notification template. Every label contains two parts: a label key (including an equal sign) and a label value.

⚠ **Caution**

To see a list of your notification labels (label key and label value), export them to a file († *References > Manage Labels > Label Import/Export* †). We strongly recommend that you create new labels instead of using the default ones. To understand why, please read *Why You Should Create New Label IDs for Customizations* [page 84].

<table>
<thead>
<tr>
<th>Label Key</th>
<th>English Label Value</th>
<th>What the English User Reads</th>
</tr>
</thead>
<tbody>
<tr>
<td>notification.ApmAdminAssessmentReminder.MessageText1=</td>
<td>Assessment Reminder has been sent to the following Raters</td>
<td>&quot;Assessment Reminder has been sent to the following Raters&quot;</td>
</tr>
<tr>
<td>notification.ApmAdminAssessmentReminder.MessageText2=</td>
<td>Rater ID : [0] ([1]) for the process : [2] ([3])</td>
<td>&quot;Rater ID : bsmith (Bob Smith) for the process : AP_100 (Training Approval)&quot;</td>
</tr>
<tr>
<td>notification.ApmAdminAssessmentReminder.Subject=</td>
<td>Assessment Reminder List</td>
<td>&quot;Assessment Reminder List&quot;</td>
</tr>
</tbody>
</table>

To use a label in a notification, you must know its label key and insert that label key in the notification as shown below:

```
<label key="notification.ApmAdminAssessmentReminder.MessageText1" />  
```
If the label you want to use contains arguments, as in the label shown in the second row of the previous table, then you must which arguments to use, as shown below:

```xml
<label key="notification.ApmAdminAssessmentReminder.MessageText2"
    arg0="<ASSESSOR_ID/>">
    arg1="<ASSESSOR_NAME/>
    arg2="<PROCESS_ID/>
    arg3="<PROCESS_TITLE/>">
</label>
```

When SAP SuccessFactors Learning Administration creates a notification message, it checks the user’s active locale ID, which a user can set in the user interface. An administrator, too, can configure the active locale ID for each user in SuccessFactors Learning Administration (People > Users > Preferences > Active Locale ID). After SAP SuccessFactors Learning Administration determines the correct locale, it replaces the label placeholder with the label value when the system creates the e-mail message. The system also replaces the syntax tag ID placeholder with the appropriate information and processes any HTML tags or direct links.

**Related Information**

- Why You Should Create New Label IDs for Customizations [page 84]
- Creating Labels to Customize the Text that Users See [page 82]

### 2.17.3.1 Creating Labels to Customize the Text that Users See

If you’re using the legacy notification editor, then you create labels to change what users see in their email notifications.

⚠️ *Caution*

If you’re using the new rich text notification editor, this section doesn’t apply to you.

You can create labels for any locale by adding them in References > Manage Labels > Labels. If you have to create several labels, then we recommend that you import a file in Label Import/Export because you can create numerous labels more efficiently by using a word processor. If you need to create only a few labels, then we recommend that you create them in References > Manage Labels > Labels.

**Related Information**

- Using Locale Labels to Translate Notifications (Legacy Editor) [page 81]
- Creating Labels to Customize the Text that Users See [page 82]
2.17.3.2 Using Labels

View this section if you want to know about using labels when editing a notification template.

You can use labels and locale labels (if your system supports a multi-language environment) to customize any notification template. Every label contains two parts: a label key (including an equal sign) and a label value. The following table shows some example labels for notifications:

<table>
<thead>
<tr>
<th>Label Key</th>
<th>Label Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>notification.ApmAdminAssessmentReminder.MessageText1=</td>
<td>Assessment Reminder has been sent to the following Raters</td>
</tr>
<tr>
<td>notification.ApmAdminAssessmentReminder.MessageText2=</td>
<td>Rater ID ( {0} ) (1) for the process ( {2} ) (3)</td>
</tr>
<tr>
<td>notification.ApmAdminAssessmentReminder.Subject=</td>
<td>Assessment Reminder List</td>
</tr>
</tbody>
</table>

To use a label in a notification, you must know its label key and insert that label key in the notification as shown below:

```xml
<label key="notification.ApmAdminAssessmentReminder.MessageText1" />
```

If the label you want to use contains arguments, as in the label shown in the second row of the previous table, then you must which arguments to use, as shown below:

```xml
<label key="notification.ApmAdminAssessmentReminder.MessageText2"
    arg0="\{ASSESSOR_ID\}"
    arg1="\{ASSESSOR_NAME\}"
    arg2="\{PROCESS_ID\}"
    arg3="\{PROCESS_TITLE\}"/>
```

When SAP SuccessFactors Learning Administration creates a notification message, it checks the user’s active locale ID, which a user can set in the user interface (Active Locale ID). An administrator, too, can configure the active locale ID for each user in SuccessFactors Learning Administration (People > Users > Preferences > Active Locale ID). After SAP SuccessFactors Learning Administration determines the correct locale, it replaces the label placeholder with the label value when the system creates the e-mail message. The system also replaces the syntax tag ID placeholder with the appropriate information and processes any HTML tags or direct links.

If you want a list of all the notification labels (label key and label value), then you can export them to a file (References > Manage Labels > Label Import/Export). Follow the Label Import/Export wizard; when you are ready to identify the labels to export, click the add one or more from list link. We recommend that you search for labels based on the label ID or label type ID. (To do so, you might need to click Add/Remove Criteria to add these options to the search framework.) You should ignore case sensitivity, select Starts With, and type “notification” in the associated box. When you click Search, SAP SuccessFactors Learning Administration returns all the notification labels. Complete the Label Import/Export wizard to create a file that contains all the notification labels.
2.17.3.3 Why You Should Create New Label IDs for Customizations

This topic explains why you should create new labels instead of using the system default labels.

⚠️ Caution

If you are using the new rich text notification editor, this section does not apply to you.

You can modify any label value for any label key in any locale ([References > Geography > Labels > Locales](#)). But if you customize the label value, then you could overwrite your customization when you apply an update: the label can set back to its default. Therefore, for notification labels, we recommend that you create a new label for each notification label.

For example, you could export all of the notification labels and use a word processor to replace `notification` with `notification.<nameofcompany>`. By using this method, you could ensure that software updates not eliminate your customized labels for notifications.

Related Information

Using Locale Labels to Translate Notifications (Legacy Editor) [page 81]
Creating Labels to Customize the Text that Users See [page 82]
3 SAP SuccessFactors Learning Notification Email Management

After you enable and configure SAP SuccessFactors Learning notification emails, you perform day-to-day management of the notifications.

After you configure notification emails, you manage notifications:

- You often make exceptions to default notifications: override the recipients of roster changes in classes, change the registration email in a course or class, and so on.
- You often send a one-time message (ad hoc message) to learners.
- You propagate changes to notifications.

3.1 Overriding Learning Expiration Notification at the Learning Item Level

Override the default settings of the learning expiration email notification at the learning item (course) level if the learning item needs special treatment.

Context

In most cases, every learning item can use the same learning expiration email notification settings. You set the default values in the Learning Expiration job configuration: System Administration ➤ Automatic Processes ➤ Learning Expiration Email Notification. In a few cases, however, you can override the default settings for one learning item. The Learning expiration defaults (Threshold and Reminder period, Email recipients such as, User, Manager) are copied from the Learning Expiration APM to the item during creation. After the item is created, the default values have to be maintained at the item level only, to act as override values. They don’t fall back to the values at the APM level. The next time that the Learning Expiration process runs and processes this learning item, it uses this learning item’s unique settings instead of the default values.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to Learning Activities ➤ Items.
2. Find and open the learning item that needs the unique learning expiration settings.
3. Choose Email Notifications.
4. Go to Override Learning Expiration Notification Defaults.

5. In Email Recipients, decide who receives the learning expiration email notification.

<table>
<thead>
<tr>
<th>When you select this...</th>
<th>...The following recipients get the email notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>The user whose learning is expiring within the threshold of days. This is the user responsible for completing the expiring learning content.</td>
</tr>
<tr>
<td>Manager</td>
<td>The managers of the user whose training is expiring.</td>
</tr>
</tbody>
</table>

6. In Threshold, type the number of days into the future that the process checks for a next action date (for curricula) or a required date (for learning items).

   For example, if you type 30 in Threshold, then when the Learning Expiration automatic process next executes, it looks 30 days into the future. If it finds any users with courses due in the next 30 days, it sends the email notification.

7. In Reminder Period, type the number of days that the process needs to wait to send a reminder.

   If you type 30 in Threshold and 7 in Reminder Period, then a user receives up to four email notifications (one message every 7 days for 30 days before the required or next action date) that remind them to complete the item. That is, if you execute the automatic process every day, then the user receives four reminders; if you run the process every two weeks, then the user receives two reminders.

8. Choose Apply Changes.

### 3.2 Overriding Course Notifications on the Learning Item Level

Override notifications at the learning item level if you have a learning item that is a special case: one that cannot use the standard notification template.

#### Context

In most cases, you can use a generic notification template for all registration, cancellation, withdrawal, and other course notifications for all courses. In some cases, you might want to override the notifications at the learning item level. When you override the notification at the learning item level, all classes for that learning item inherit the unique notification for the learning item, not the generic one.

#### Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to Learning Activities > Items.
2. Find and open the learning item that needs the unique notifications.
3. Click Notifications.
4. Locate the notification you want to change by its section.
   
   For example, if you want to edit the notification for the cancellation of classes based on this learning item, go to *Edit the Class Cancellation Notification for the Item*.

5. Click *Launch Editor* in the section.

6. Use the editor to modify the content of the template.

7. Select *Use Editor Content When Sending Email Notification*.

8. To attach a unique file with this notification, go to *New Attachment* and then click *Choose File*.

### 3.3 Overriding Course Notifications on the Class Level

Override notifications at the class level if you have a class that is a special case: one that can’t use the standard notification template and can’t use an override at the learning item level.

#### Context

In most cases, you can use a generic notification template for all registration, cancellation, withdrawal, and other course notifications for all courses. In some cases, you want to override the notifications at the learning item level. When you override the notification at the learning item level, all classes for that learning item inherit the unique notification for the learning item, not the generic one. In a few cases, you might want to override the unique notification of the learning item for an individual class. For example, you might want to write special registration instructions for an offering that is scheduled in an uncommon location.

In [Learning Activities ➔ Classes ➔ Notifications](#), you can view and modify the registration, cancellation, withdrawal, and waitlist notifications that the system sends to users, supervisors, instructors, and other contacts who are associated with this class. You identify contacts in [Classes ➔ Contacts](#).

#### Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to [Learning Activities ➔ Classes](#).
2. Find and open the class that needs the unique notifications.
3. Click *Notifications*.

   → **Tip**

   Depending on how your administrator environment is configured, you might need to click *More* to see *Notifications*.
4. Locate the notification you want to change by its section.

   For example, if you want to edit the notification for the cancellation of classes based on this learning item, go to *Edit the Class Cancellation Notification for the Class*.

5. Click *Launch Editor* in the section.

6. Use the editor to modify the content of the template.

7. Select *Use Editor Content When Sending Email Notification*.

8. To attach a unique file with this notification, go to *New Attachment* and then click *Choose File*.

### 3.4 Creating Course Registration Instructions

Create course registration instructions for users so that when they receive notifications about enrollment or cancellation, they know what to do.

**Prerequisites**

Enable notifications and check these templates, which are used for registration instructions:

- SystemWaitlistNotification
- SystemPendingNotification
- SystemUnenrollmentNotification
- SystemScheduleCancellationNotification
- SystemEnrollmentNotification
- ApmInstanceDelivery

**Procedure**

1. Log in to SAP SuccessFactors Learning Administration and then go to *Learning Activities > Items*.
2. Find the learning item that requires special registration instructions and open it.
3. Go to *More > Notifications*.
4. In the *Edit Registration Text* section, click *Edit*.
5. For each language that you have installed, type your registration information and then save it.
6. Go to the notification where you want to add registration text.

<table>
<thead>
<tr>
<th>Location</th>
<th>Why you edit notifications in this location</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administration &gt; Manage Email &gt; Email Notification Templates</td>
<td>The notifications in the <em>Configuration</em> section are the default configurations that are triggered by events (such as enrollment or withdraw) and by Automatic Process Managers (APM).</td>
</tr>
</tbody>
</table>
### Location

<table>
<thead>
<tr>
<th>Location</th>
<th>Why you edit notifications in this location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Activities &gt; Items &gt; More &gt; Notifications</td>
<td>The notifications in Items supersede any notifications in the Configuration section for the particular learning item. See the headings of the page to understand when the notifications are sent.</td>
</tr>
<tr>
<td>Learning Activities &gt; Classes &gt; More &gt; Notifications</td>
<td>The notifications in Scheduled Offering supersede any notifications in the Item or Configuration sections for the particular scheduled offering. By default, classes inherit their notifications from the learning item. See the headings of the page to understand when the notifications are sent.</td>
</tr>
</tbody>
</table>

7. Add the following syntax tags to the notification as necessary.

Not all notifications can use these syntax tags. To check if your notification can use them, click Syntax Tags for any notification.

<table>
<thead>
<tr>
<th>Syntax Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&lt;CPNT_INSTRUCTIONS/&gt;</code></td>
<td>This contains the learning item registration instructions that you wrote in Learning &gt; Items &gt; Notifications.</td>
</tr>
<tr>
<td><code>&lt;CPNT_INSTRUCTIONS_ADDED/&gt;</code></td>
<td>This syntax tag contains the same contents as <code>&lt;CPNT_INSTRUCTIONS/&gt;</code>, but the notification syntax group APM_STUDENT_LEARNING_PLAN_NOTIFICATION requires the _ADDED, _MODIFIED, and _DELETED convention.</td>
</tr>
<tr>
<td><code>&lt;CPNT_INSTRUCTIONS_MODIFIED/&gt;</code></td>
<td>This syntax tag contains the same contents as <code>&lt;CPNT_INSTRUCTIONS/&gt;</code>, but the notification syntax group APM_STUDENT_LEARNING_PLAN_NOTIFICATION requires the _ADDED, _MODIFIED, and _DELETED convention.</td>
</tr>
<tr>
<td><code>&lt;CPNT_INSTRUCTIONS_DELETED/&gt;</code></td>
<td>This syntax tag contains the same contents as <code>&lt;CPNT_INSTRUCTIONS/&gt;</code>, but the notification syntax group APM_STUDENT_LEARNING_PLAN_NOTIFICATION requires the _ADDED, _MODIFIED, and _DELETED convention.</td>
</tr>
</tbody>
</table>

### Next Steps

Classes automatically inherit the instructions of their learning items. If you want to write instructions specific to the scheduled offering, go to Learning Activities > Classes > Notifications and click Edit in the Edit Registration Text area.
3.5 Setting Notification Preferences for Class Registration Lists

Set the notification preferences for class notification lists to control the people in the class receive notifications about the roster.

Context

Classes have many types of users attached to them: instructors, learners, contact people, and so on. You can control the recipients of email for a particular class when SAP SuccessFactors Learning changes a registration status.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to Learning Activities > Classes.
2. Find and open the class that you want to manage.
3. Click Registration.
4. Click Settings.
5. In Send Notifications to, select the type of users who should receive notifications.

<table>
<thead>
<tr>
<th>Type of User</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Users are the learners in the class. They can have different registration status values: waitlisted, registered, pending registration, and so on.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Supervisors are the managers of the users who are in the class.</td>
</tr>
<tr>
<td>Instructor</td>
<td>Instructors include any instructor of any segment in the class.</td>
</tr>
<tr>
<td>Contacts</td>
<td>Contacts are usually people who should be informed of changes to the scheduled offering. For example, an administrator who is responsible for the scheduling.</td>
</tr>
</tbody>
</table>

6. To email the organization owner about changes to slots, select E-mail Slot Confirmations to Organizations.
7. Click Save.
3.6 Sending Email Messages to Groups of SAP SuccessFactors Learning Users

Send email messages to specific groups of SAP SuccessFactors Learning users when you want to communicate with all users in a course, a curriculum, and so on.

Context

As an administrator, you often need to get a message to all users assigned to a learning event. For example, if the room for a course changes at the last minute, you want to make sure that the users in that course get an email notifying them of the change. You can use the Send Notifications wizard to send those kinds of communications.

You can launch the Send Notifications wizard by going to Manage User Learning > Send Email Notifications and look up the learning event that defines the recipients (look up a class, for example, and send a message to all users in that class). You can also start at the record (for example, in the class at Learning Activities > Classes and click Email Notifications. When you start at the record, SAP SuccessFactors Learning passes the learning event to the wizard so that you do not need to look it up.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to Manage User Learning > Send Email Notifications.
2. In Step 1, select the SAP SuccessFactors Learning event type that contains the users you want to send an email to.
   For example, if you want to send a message to all users in a program, select Program.
3. Click Next.
4. In Step 2, select the exact objects that you want to send messages to.
   For example, if you want to send messages to users in PROG-100 and PROG-200, find those programs and add them to the list.
5. In Step 3, reduce the population by their attributes.
   - Any Type sends a message to users who have any assignment type except users with blank (null) item assignments
   - No Type sends a message to users who have no item assignment types (null: they do not have an assignment type)
   - Any Completion Status sends a message to any user who has attempted the learning event (the event is in their learning history)
   - No Completion Status sends a message to users who do not have any history of the event

   For example, you can send a message to users who have completed a curriculum or users who are incomplete in the curriculum. You might want to send a message that time is running out to complete the curriculum. That message should go to incomplete users only.
6. In **Step 4**, add the specific users who should receive the communication.

You can, for example, search for users in a specific region who were assigned a class and send the message to only those users.

7. In **Step 5**, you create the message that you want to send.

<table>
<thead>
<tr>
<th>Choice to create message</th>
<th>How you use the choice</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email Template</strong></td>
<td>You can select a template to send a pre-written message to users. You might, for example, want to re-send the enrollment boilerplate message.</td>
</tr>
<tr>
<td><strong>Reply To</strong></td>
<td>You can elect to have users' replies to the message go to a specific address. If you do not provide a reply-to address, then replies go to the address in <strong>From</strong>.</td>
</tr>
<tr>
<td><strong>From</strong></td>
<td>This is the address that the message comes from.</td>
</tr>
<tr>
<td><strong>Send copies to</strong></td>
<td>When you select recipients to receive copies, type them here. We caution you from using this option with large distribution lists because the recipients receive one copy for each user receiving the message: if you are sending the message to 1000 users, the addresses in <strong>Send copies to</strong> receive 1000 messages.</td>
</tr>
<tr>
<td><strong>Second copy of email to users' supervisors</strong></td>
<td>When you select this, users' supervisors get a copy of the message. The subject line of the supervisor's message is prefixed by &quot;Copies of email sent to your employees.&quot;</td>
</tr>
<tr>
<td><strong>Customize Contents</strong></td>
<td>The options in <strong>Customize Contents</strong> send a totally custom message as opposed to the pre-written template.</td>
</tr>
</tbody>
</table>

8. Click **Send Notification**.

**Sending a Notification Email from SAP SuccessFactors Learning to an Individual User** [page 93]

Send a notification email from SAP SuccessFactors Learning to an individual user if you need to communicate with the user and you want the notification to come from SAP SuccessFactors Learning through standard processes instead of from your account as an administrator.

**Sending Ad Hoc Communication with All Users Assigned to a Learning Item** [page 94]

If you need to send a one-time message to all users who are assigned to a learning item, you can send that message as an email from SAP SuccessFactors Learning.

**Sending Ad Hoc Communication with All Users Assigned to a Class** [page 95]

If you need to send a one-time message to all users who are assigned to a class, you can send that message as an email from SAP SuccessFactors Learning.

**Syntax Tags Used in Ad Hoc Notifications** [page 95]

View this section if you want to know about syntax tags used in ad hoc notifications.
3.6.1 Sending a Notification Email from SAP SuccessFactors Learning to an Individual User

Send a notification email from SAP SuccessFactors Learning to an individual user if you need to communicate with the user and you want the notification to come from SAP SuccessFactors Learning through standard processes instead of from your account as an administrator.

Context

When you send a notification from the application rather than from your own email account, you follow your organization’s standard for communicating with users about learning issues.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to People > Users.
2. Find and open the user who you want to email.
3. In Actions, click Send Notifications.

Results

You go to the last step of the Send Notifications wizard. The system goes to the last step because all the preceding steps help you narrow the users who receive the message. In this case, you’re sending the message to only the current user.

Task overview: Sending Email Messages to Groups of SAP SuccessFactors Learning Users [page 91]

Related Information

Sending Ad Hoc Communication with All Users Assigned to a Learning Item [page 94]
Sending Ad Hoc Communication with All Users Assigned to a Class [page 95]
Syntax Tags Used in Ad Hoc Notifications [page 95]
3.6.2 Sending Ad Hoc Communication with All Users Assigned to a Learning Item

If you need to send a one-time message to all users who are assigned to a learning item, you can send that message as an email from SAP SuccessFactors Learning.

Prerequisites

SAP SuccessFactors Learning sends your communication as an email, which means that the users in the learning item must have an email address and your implementation must be connected to an email server.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to Learning Activities Items.
2. Find and open the learning item that is assigned to the users who you want to communicate to.
3. In Actions, click Send Notification.

Results

When you click Send Notification, you launch the Send Notifications wizard with the recipient population prepopulated to all users of this learning item.

Task overview: Sending Email Messages to Groups of SAP SuccessFactors Learning Users [page 91]

Related Information

Sending a Notification Email from SAP SuccessFactors Learning to an Individual User [page 93]
Sending Ad Hoc Communication with All Users Assigned to a Class [page 95]
Syntax Tags Used in Ad Hoc Notifications [page 95]
3.6.3 Sending Ad Hoc Communication with All Users Assigned to a Class

If you need to send a one-time message to all users who are assigned to a class, you can send that message as an email from SAP SuccessFactors Learning.

Context

Often, you need to send a notification to a group of users who are associated with a class. For example, you might want to notify instructors of a change in location. You build the notification with the standard Send Notification tool. You skip the first few steps of the wizard because those steps identify the record that the recipients share. The system knows that you mean to send a notification to users associated with this class because you launched the wizard from the class record.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to Learning Activities Classes.
2. Find and open the class that is assigned to the users who you want to communicate to.
3. In Actions, click Send Notification.

Task overview: Sending Email Messages to Groups of SAP SuccessFactors Learning Users [page 91]

Related Information

Sending a Notification Email from SAP SuccessFactors Learning to an Individual User [page 93]
Sending Ad Hoc Communication with All Users Assigned to a Learning Item [page 94]
Syntax Tags Used in Ad Hoc Notifications [page 95]

3.6.4 Syntax Tags Used in Ad Hoc Notifications

View this section if you want to know about syntax tags used in ad hoc notifications.

The table below shows the ad hoc syntax tags and where they can be used.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can use only &quot;user&quot; syntax tag IDs with an ad hoc notification; that is, you can’t use all of the syntax tag IDs associated with the notification template ID that you’re using to base the ad hoc notification unless those syntax tag IDs are also part of the user-specific syntax tag IDs. Therefore, you must delete the non-user specific</td>
</tr>
</tbody>
</table>
syntax IDs; otherwise, the syntax tag appears as text in the notification. For example, if you include the text "The Job ID is: &lt;JOB_ID/&gt;." when you're creating an ad hoc notification message, the user receives that exact text: "The Job ID is &lt;JOB_ID/&gt;.”

<table>
<thead>
<tr>
<th>Syntax Tag IDs</th>
<th>Where the tag can be used</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;STUD_ID/&gt; (User ID)</td>
<td>Any ad hoc notification</td>
</tr>
<tr>
<td>&lt;STUD_NAME/&gt; (User Last Name, First Name)</td>
<td>Any ad hoc notification</td>
</tr>
<tr>
<td>&lt;STUD_ORG/&gt; (User organization)</td>
<td>Any ad hoc notification</td>
</tr>
<tr>
<td>&lt;STUD_DMN/&gt; (User domain)</td>
<td>Any ad hoc notification</td>
</tr>
<tr>
<td>&lt;CPNT_ID/&gt; (Item ID)</td>
<td>Users ➤ Tools ➤ Send Notifications ➤ Requests tab for an item</td>
</tr>
<tr>
<td>&lt;CPNT_TITLE/&gt; (Item Title)</td>
<td>Users ➤ Tools ➤ Send Notifications ➤ Requests tab for an item</td>
</tr>
<tr>
<td>&lt;CPNT_DESC/&gt; (Item Description)</td>
<td>Users ➤ Tools ➤ Send Notifications ➤ Requests tab for an item</td>
</tr>
<tr>
<td>&lt;SCHD_DESC/&gt; (Schedule Description)</td>
<td>Users ➤ Tools ➤ Send Notifications ➤ Scheduled offering record ➤ Learning Activities ➤ Classes ➤ Registration tab</td>
</tr>
<tr>
<td>&lt;SCHD_SEGM/&gt; (Schedule Segments)</td>
<td>Users ➤ Tools ➤ Send Notifications ➤ Registration tab for a scheduled offering</td>
</tr>
</tbody>
</table>

In the other ad hoc notifications, you can filter the users to whom you want to send notifications, but you must delete the non-user specific syntax tag IDs.

**Parent topic:** Sending Email Messages to Groups of SAP SuccessFactors Learning Users [page 91]

**Related Information**

- Sending a Notification Email from SAP SuccessFactors Learning to an Individual User [page 93]
- Sending Ad Hoc Communication with All Users Assigned to a Learning Item [page 94]
- Sending Ad Hoc Communication with All Users Assigned to a Class [page 95]
3.7 Notifying Instructors of Teaching Assignments

Notify instructors of teaching assignments so that they can block their calendars for the assignment.

Prerequisites

Assign at least one instructor to the class segments. Ideally, you should assign all primary and secondary instructors to the segments before you send the notification.

Context

Unless instructors are watching their instructor dashboards (My Classes), they won’t see that they have upcoming training assignments. You send notifications to tell instructors about new teaching assignments.

Note

You can also send notifications when you first create a class by selecting Notify Instructors in the create class window.

Procedure

1. Go to SAP SuccessFactors Learning administration and then go to Learning Activities Classes.
2. Search for and open the offering (the course) that the instructors are teaching.
3. Go to Segments.
4. For each segment, verify that you have assigned a primary and (optionally) secondary instructors.
5. In the Actions menu, click Notify Instructors.
6. In Notify Instructors, select the instructors who should receive the notification and then click Send Notification.

Results

Instructors receive a calendar invite or a calendar attachment for the time of the course and they receive details about the class. Whether they receive an invite or attachment and the exact details they receive vary depending on your configuration. You configure the information in the InstructorAssignmentNotification notification template.
3.8 Propagating Learning Expiration Automatic Process Default Settings to All Active Learning Items

Propagate the Learning Expiration Automatic Process default settings to push the settings from the automatic process to all active learning items. This removes any exceptions you made in individual learning items.

Context

When you configure notifications for SAP SuccessFactors Learning, you create an automatic reminder for users to tell them when they should act on course assignments. You set the parameters for the reminder globally, in [System Administrator ➤ Automatic Processes ➤ Learning Expiration Email Notification]. The global defaults are copied at the item level on creation of the item. Even if there’s no manual change at the item level, it is a copy of the default values that were first created. The Propagate settings to all active items is only going to copy the new defaults for all the active items.

⚠️ Caution

This resets all overrides to the default, global values. To reset individual overrides, go to [Learning Activities ➤ Items] and then open the individual learning items.

Procedure

1. Go to SAP SuccessFactors Learning Administration, and then go to [System Administration ➤ Automatic Processes ➤ Learning Expiration Email Notification].
2. Choose Propagate settings to all active items.
3. Choose Yes in the warning message page.
4. Make the required changes in the Schedule Background Job page, and then click Finish.
3.9 Blocking SAP SuccessFactors Learning Email Messages to Declared Addresses

Block SAP SuccessFactors Learning email messages if a person is receiving unwanted messages.

Context

Blocking all SAP SuccessFactors Learning messages to an address is like an unsubscribe action. You can quickly prevent what the receiver experiences as spam while you diagnose the root cause of the problem.

Procedure

1. Go to SAP SuccessFactors Learning Administration and then go to [System Administration ➔ Configuration ➔ Global Application Settings ➔ Mail ➔].
2. In Block all emails to, type the email address of the person who is receiving unwanted messages.
3. To add additional addresses, click Add another.
4. Click App Changes.

Next Steps

 Blocking emails to an address is a temporary fix. Please investigate the root cause of the problem, which can be as simple as a typo in the email address for an actual user of SAP SuccessFactors Learning.

3.10 Email Notification Template Overrides at the Learning Item Level

You can override the default email notifications for a learning item to create email notifications that are specific to the learning item.

In most cases, you want central control of email notifications for learning items, in [System Administration ➔ Manage Email ➔ Email Notification Templates]. You want to manage a single email notification for things like canceling a course or registration email notifications. In a few cases, however, you might want to create a special email notification for a specific course. In these cases, you can override the central, default template with a custom email notification for the learning item.
⚠️ Caution

If you attach a file or customize any of the values on the learning item level, in Learning Activities > Items > Email Notifications, then the system breaks the link between this email notification and its corresponding central email notification template ID. If you break a link, then the system no longer propagates modifications that you make to the email notification template ID to this email notification.

3.11 Notification Inheritance from Learning Item to Class

This topic describes how the class inherits its notification information from the learning item that it is associated with.

When you create a class, the system automatically copies the content from Learning Activities > Items > Notifications to Learning Activities > Classes > Notifications for this class. When you update any value in the learning item notification, the system automatically updates the class notification. If, however, you change the notification in the class, you stop the inheritance and the class no longer receives modifications that you make to the item. When you make changes to the class notification, you do not affect the learning item notification.

3.12 Locations Where You can Send Ad Hoc Notifications in SAP SuccessFactors Learning

You can send ad hoc notifications from SAP SuccessFactors Learning in a small set of locations.

<table>
<thead>
<tr>
<th>Location that Launches Ad Hoc Notifications</th>
<th>Why You Launch from this Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>People &gt; Users &gt; Search Results</td>
<td>To send an ad hoc notification to the required users.</td>
</tr>
<tr>
<td>Learning Activities &gt; Classes &gt; Actions</td>
<td>To send an ad hoc notification to any users.</td>
</tr>
<tr>
<td>People &gt; Organizations &gt; Users</td>
<td>To send an ad hoc notification to users assigned to an organization.</td>
</tr>
<tr>
<td>Learning Activities &gt; Items &gt; Actions</td>
<td>To send an ad hoc notification to users who have requested an item.</td>
</tr>
<tr>
<td>Learning Activities &gt; Competencies &gt; Users</td>
<td>To send an ad hoc notification to users who are assigned to a competency.</td>
</tr>
<tr>
<td>Learning Activities &gt; Items &gt; Actions</td>
<td>To send an ad hoc notification to any users.</td>
</tr>
<tr>
<td>People &gt; Users &gt; Actions</td>
<td>To send an ad hoc notification to any users.</td>
</tr>
<tr>
<td>Location that Launches Ad Hoc Notifications</td>
<td>Why You Launch from this Location</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>[Learning Activities ➔ Programs ➔ ]</td>
<td>To send an ad hoc notification to any users.</td>
</tr>
<tr>
<td>[Learning ➔ Curricula ➔ Actions ➔ ]</td>
<td>To send an ad hoc notification to any users.</td>
</tr>
</tbody>
</table>

**Related Information**

The Difference Between Ad Hoc and System Notification Templates in SAP SuccessFactors Learning [page 52]
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