



## Manage Email Administration

The Email Administration area of Cornerstone allows administrators to create and edit emails and associate these emails with pre-defined triggers. Take advantage of Email Tags to dynamically substitute specific information, such as the user's name, the start date and time of an ILT Session, the due date of required training, etc. You can set up emails to be sent to specific users or to users in specific roles or organizational units. Emails will be sent when specific actions occur in Cornerstone and/or at a specific time. There are four categories of emails: confirmation, notification, reminder, and promotional. It is important to understand the differences between these categories in addition to the options available to you to take full advantage of the Email tool in Cornerstone. To access **Email Administration**:

1. Open the **Admin** tab in the menu bar and select **Email** in the dropdown menu.
2. Use the **Enter Search Text** box to search the library of available emails. Use the **Text Field** dropdown to search different fields, including Email Action, Email Subject Line, or Email Message (Body), and the other dropdown menus to further filter the list. You may filter by **Email Action Type** (the part of the Cornerstone system that the email targets) and **Email Category** (Confirmation, Notification, Reminder, and Promotional).

Enter Search Text:	Select Text Field to Search:	Select Email Action Type:	Select Email Category:
<input type="text"/>	Email Action ▼	ILT Administration ▼	All Categories ▼
<input type="button" value="Search"/>			

## Manage ILT Administration, Instructor Led Training, and Training Emails

While there are many emails available, the most useful **Email Action Types** include **ILT Administration**, **Instructor Led Training**, and **Training** emails. It is important to familiarize yourself with the emails in these Action Types, with the settings available to you, and with the triggers, conditions, and options that will determine how, when, and to whom these emails are sent.

1. From the **Email Administration** page, enter the desired search terms in the **Enter Search Text** box, then select **ILT Administration** in the **Email Action Type** dropdown, and then select **Search**. To see all emails associated with **ILT Administration**, repeat the previous steps without entering any text in the **Enter Search Text** field.
2. Use the **Expand** button  to the left of the Email Action to display the emails associated with that action. For example, for the **Session Start Date** email action, selecting the Expand button will expand the list of emails associated with that action, including Reminder emails sent according to various time frames to the indicated recipients. The table also indicates whether the email is **Active**.



- Under the **Options** column, select the **Edit** button to edit the Email title, its **Type** (including time frame for a **Reminder** email), the **Tags** available for the email's conditions and for the email's subject and body, the **Conditions** that can further restrict when the email is triggered (email is sent according to the indicated time frame when an action triggers it IF the Condition is not defined or is TRUE), the Recipients (by selecting Users or Organizational Units), the email's **Availability** (to further restrict who should receive the email), the email **Subject** and the email **Message**.
- To duplicate an existing Email, select the **Copy** button . You can then edit any of the fields to create a new email under the same Action, with different conditions, triggers, time frames, tags, message content, etc.

Session Start Date	ILT Administration		ILT Session start date			
Email	Category	Recipients	Availability	Language	Active	Options
Session Start Date	Reminder	Session attendees		English (US)	<input type="checkbox"/>	

- Select the **Export Log** button to download an export log of emails sent in the past 30 days under the related trigger. The export log contains the email subject, email address, and the time sent.

If you turn on **Custom Emails** for a Learning Object that are not active in the main Email Administration area, you will need to download the export log from the Emails section of that LO's settings.

Only **Active** emails will be sent when their trigger conditions are met. Use the checkbox on the emails table to activate or deactivate an email.

For tips on Email settings in Sessions, consult the Job Aid "Email Session Attendees".

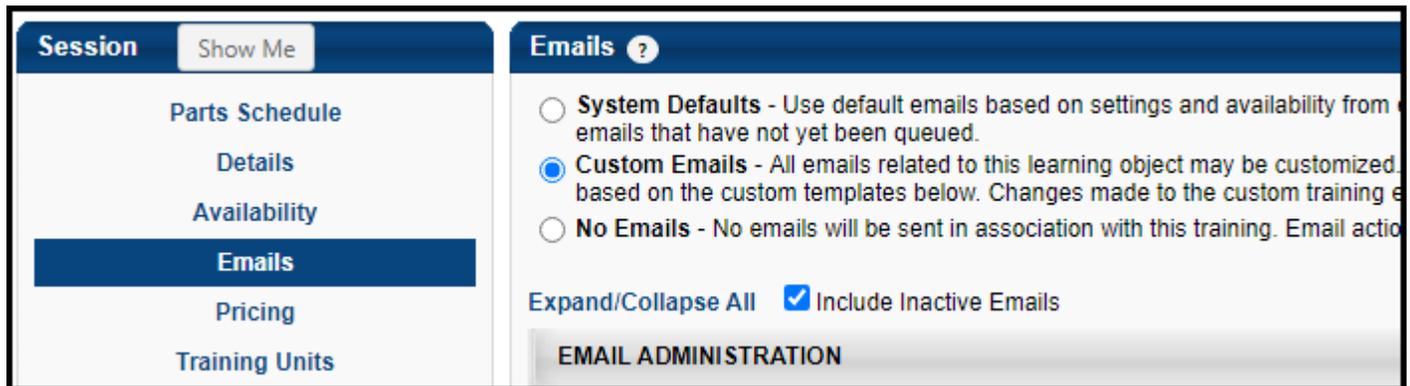
Before making an Email **Active**, confirm that its trigger, conditions, recipients, and availability correspond to expectations and to a business need.

If you use any email address in the From Address field besides [NoReply@training.wisconsin.gov](mailto:NoReply@training.wisconsin.gov), the email will not be delivered to external users, aka self-registration users. However, if the email will only ever be sent to internal users, then you may opt to use a different From Address if desired.



## Create Custom Emails for individual LOs

1. Open the **Admin** tab in the menu bar and select **Email** in the dropdown menu.
2. Use the **Enter Search Text** to search by Email Action trigger, Email Subject, or text from the Email Message.
3. When you locate the correct Email Action trigger, use the **Add New Email** button  or the **Copy** button  to create a new email within the selected trigger.
4. Fill out all fields on the Create New Email page, including **Conditions, Email Type, Availability, Email Tags, Message**, etc. When finished, select **Save**.
5. Make sure that the Active checkbox for the email you just created is NOT checked. You will activate this email from the Custom Email settings page of the individual LO.
6. Locate the individual LO's settings page.
  - a. For an **Online Class**, use the Course Catalog (**Admin > Course Catalog > Edit** from dropdown > **Emails** tab).
  - b. For an **ILT Session**, search for the Event Name under **Manage Events & Sessions**, select the **View Sessions** button  to see scheduled Sessions, select the **Edit** button  for the Session, then select the **Emails** page from the Session details page.



7. Select the **Custom Emails** radio button. All email settings are inherited from the main **Email Administration** page, but you can further customize them from this page.
8. Locate the Email Action you just created. Find the Active checkbox on the right side of the screen, and make sure to check this box to turn on this email, ONLY for the selected Session. Select the **Edit** button  if you would like to further customize the email for the selected Session.



 Any edits made to an Email in the **Custom Emails** area will only apply to the selected LO and NOT to emails in the main **Email Administration** area.