

Requirement Name: Allow for Enterprise / User Level Email Notifications

Requirement Description: Create an Admin feature that allows the System Administrator to determine which of the following actions should trigger an email notification to users. Additionally, create a Notifications area within *Preferences* which allows the user to select, or de-select, which actions should trigger notifications for their personal account. If the client is user the Manager Assessment functionality the Admin will have the ability to determine if the email notification should be sent out to the Manager and or the User / Employee.

The following actions should be available to turn on/off at the Admin level. At the User level the employee should simply be able to uncheck the organization's default.

List of Notifications

PRIORITY	Action	Notify Manager	Notify Employee
1	Self Assessment Submitted (Complete)	Y DR Report Status are bundled into 1 email per schedule	Y
1	Manager Assessment Submitted (Complete)	N	Y
1	Updated Skills Inventory (new skill scored, skill score changed)		Y
1	Completed an item(s) on your Development Plan		Y
1	Reminder of item coming due on your Development Plan		Y
2	Completed Self-registration		
2	Selected a new job role. (via the Preferences menu, not Gap Report change level)		
2	Employee assessment complete		
2	Added Learning Resource(s) to your Development Plan		
2	Pre-loaded a user		

Bundling rules

- Notifications go out only once per day on pre defined schedule.
- One email per notification action/category.

Schedule

- Time schedule - Default is 1x per day at preset time. Clients cannot change schedule for initial release. Adding scheduling changes to roadmap for future enhancement.

Each email message should be unique based on the action above. (Messages will be determined in the near term.) Each message should address the user by first name, as listed in IT Skill Builder. The messages should be default messages with templates that can be altered by the System Admin within each organization.

Messaging for the top five priority messages are as follows:

SELF ASSESSMENT COMPLETED - Employee

Subject: IT Skill Builder: Congratulations on completing your self-assessment!

Body: Congratulations \$_FirstName,

You have completed your self-assessment within IT Skill Builder. With the information you learned you can now begin to view the contents of the Resource Guide and add items to your personal Development Plan.

Keep up the good work!

Regards,

The IT Skill Builder Team

[Link to Skill Builder here <>](#)

SELF ASSESSMENT COMPLETED - Manager

Subject: IT Skill Builder: A direct report has completed their self-assessment.

Body: Hello <Manager First Name> [\$_Respondent FirstName],

<Direct Report first name>[\$PARTICIPANT could be multiple names here] has completed their self-assessment within IT Skill Builder. <direct report> can now begin to view the contents of the Resource Guide and add items to their personal Development Plan.

Regards,

The IT Skill Builder Team

Link to Skill Builder here <>

MANAGER ASSESSMENT COMPLETED - Employee

Subject: IT Skill Builder: Your manager's assessment of your skills is complete.

Body: Hello \$_FirstName,

Your manager has completed their assessment of your skills within IT Skill Builder. Once your self-assessment is complete, you will be able to ~~view~~ compare your assessments.

Regards,

The IT Skill Builder Team

Link to Skill Builder here <>

COMPLETED ITEMS ON DEVELOPMENT – Employee

Subject: IT Skill Builder: Congratulations on completing an item on your Development Plan!

Body: Congratulations, \$_FirstName ,

You have completed one or more items on your IT Skill Builder Development Plan. We hope you found the sources to be beneficial and were able to increase your knowledge for this competency.

Keep up the good work!

Closing: The IT Skill Builder team

Link to Skill Builder here <>

UPDATED SKILLS INVENTORY - Employee

Subject: IT Skill Builder: Congratulations on updating the Skills Inventory!

Body: Congratulations, \$_FirstName ,

You have made an update to the Skills Inventory within in IT Skill Builder. This is a great place to highlight of all the great things you are able to contribute to the organization.

Keep up the good work!

Closing: The IT Skill Builder team

Link to Skill Builder here <>

DEVELOPMENT PLAN ITEM COMING DUE – EMPLOYEE

Subject: IT Skill Builder: Development Plan Item Coming Due

Body: Hello \$_FirstName ,

The following development plan item(s) are coming due: <\$_dev plan item title> (could be multiple). Log into IT Skill Builder and click on the Development Plan button to view your personal plan.

Keep up the good work!

Closing: The IT Skill Builder team


Link to Skill Builder here <>


Question: Can we/ should we truncate Development Action (TIP) 'titles' in the body of this email?


Admin Access options

A. Update User Admin screens to add notification functions (Priority 1)

User Administration AdminUser Prudential

 **User Notifications/ Emails**

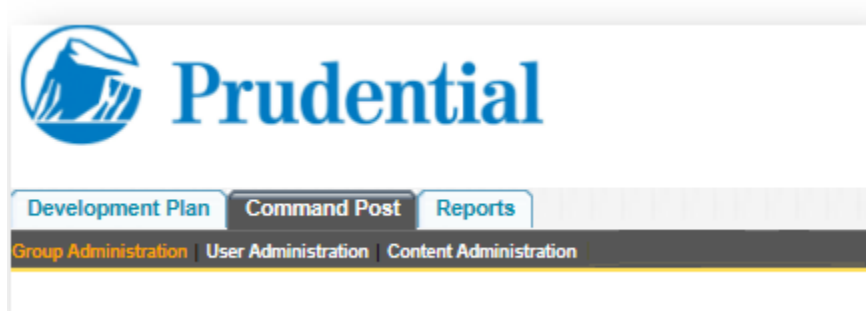
 **Users**

 **Search Users**

First Name:
Last Name:
Email:
XID:

Add submenu and new notification screens (Priority 2)

The Email Notification feature available to each System Admin (most likely) via a new menu option titled "Notification Administration" and assumingly the same person with that has the other Admin tab access.



Development Plan
Command Post
Reports
Home | Help | Preferences | Log-out

Group Administration | User Administration
Trial Site Admin

User Administration: Trial Site Admin

Development Plan Invitation (show)

Pre-registered Users - Invitation (show)

Survey Email Invitations

Participant Invitation (show)

Participant Reminder (show)

Respondent Invitation (show)

Respondent Reminder (show)

Notification Setting

☐ Completed Self-registration (show)
☐ Selected a new job role. (via the Preferences menu, not Gap Report change level) (show)
☐ Self Assessment Status Update (show)
☐ Manager Assessment Status Update
☐ Updated your Skills Inventory (new skill scored, skill score changed)
☐ Added Learning Resource(s) to your Development Plan
☐ Completed an item on your Development Plan
☐ Reminder of item coming due on your Development Plan
☐ Pre-loaded a user

Back

Notes

- Default for all clients is ON/ Flagged.
- When notification turned off at enterprise level, user sees notification greyed out – not selected in My Notification view.
- Admin can change these on-going.
- Need Admin help text and add user impact warnings to Admin help file.
- Only P1 notifications are in scope for first release

My Notifications

Employee can turn off notifications (turned on at enterprise level) by un-checking. Notification list will match Admin notifications. Notifications turned off at the enterprise level are grayed out – visible but unselectable.

The screenshot displays the 'IT Skill Builder' user interface. At the top, there is a header with the logo and title. Below this, the page is divided into several sections:

- Set your Personal Account Information:** This section contains five input fields: 'First Name' (Alpha), 'Last Name' (Manager), 'Email Address' (alpha.mgr@test.tst), 'Password', and 'Confirm Password'. A red error message below the password fields states: 'Passwords must be at least six characters upper case, lower case, numbers and special characters'.
- Select your Job:** This section has two expandable options: 'Business Solutions/Capability' and 'Business Relationship Mgmt'. Below these, it shows 'Manager: Manager Name'.
- Change Preference Settings:** This section has two expandable options: 'My Sharing' and 'My Notifications'.
- My Notifications:** This section is expanded, showing a list of notification types with checkboxes. All checkboxes are currently checked:

<input checked="" type="checkbox"/>	New Job Role selected
<input checked="" type="checkbox"/>	Self Assessment status update
<input checked="" type="checkbox"/>	Manager Assessment status update
<input checked="" type="checkbox"/>	Skill Inventory status update
<input checked="" type="checkbox"/>	Learning Resource(s) added to plan
<input checked="" type="checkbox"/>	Dev Plan status
<input checked="" type="checkbox"/>	Dev Plan Item due reminders

Notes

My Sharing is out of scope for this release.

Request Initiated By: Prioritization meeting

Product Manager: Amy Tessier

Notes

FYI - SuperAdmin Notes from Email templates page view.

List of all available email campaigns: 'Respondent Invitation', 'Participant Results', 'Respondent Invitation after Add', 'Respondent Reminder', 'All Active Users', 'Participant Invitation', 'Managers who need to set Dev Opportunities(CDX)', 'Development Plan User Inactive', '**Development Plan Goal Due Reminder** (JnJITS)', 'Participant Results View Invitation in Open Enrollment', 'Development Plan Invitation', 'Dev Opportunity but No Current Plan', 'Participant Reminder',