

Email Notification

Overview

The Email Notification module allows you to create and manage email notification templates that can be automatically sent based on service and form configurations. This guide will walk you through all the features and workflows available in this module.

Email Notifications List

Accessing the List


The screenshot shows the NEXUS system interface. The left sidebar contains a navigation menu with the following items: Hub, Drug and Alcohol, Reports, Settings, My Company, Work Group, Modules, Services, Forms, Stakeholders, Organization, Import Employees, Access Management, Custom Columns, Parameters, Email Notifications, and Notifications. The 'Email Notifications' item is highlighted with a red arrow and a red circle containing the number 2. The main content area displays a table titled 'List of notification to send' with a search bar and a 'NEW' button. The table has the following columns: Subject, Name, For whom, Description, Status, and Options. The table contains 12 rows of notification templates. A red arrow points to the 'Email Notifications' item in the table, and another red arrow points to the 'Email Notifications' menu item in the sidebar.











Subject	Name	For whom	Description	Status	Options
\$(typeTest.name) Testing Activ...	mis REQUESTED INCOMPLETE	REQUESTED	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis REQUESTED COMPLETE	REQUESTED	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_INTERNAL INCOMPLETE	STAKEHOLDER_INTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_INTERNAL COMPLETE	STAKEHOLDER_INTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_EXTERNAL INCOMPLETE	STAKEHOLDER_EXTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_EXTERNAL COMPLETE	STAKEHOLDER_EXTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_VENDOR INCOMPLETE	STAKEHOLDER_VENDOR	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_VENDOR COMPLETE	STAKEHOLDER_VENDOR	The same template for MIS test types	ENABLED	
The Random "\$(randomPool.name)...	Random REQUESTED INCOMPLETE	REQUESTED	Template for creating Random	ENABLED	
The Random "\$(randomPool.name)...	Random REQUESTED INCOMPLETE	STAKEHOLDER_INTERNAL	Template for creating Random	ENABLED	


The Email Notifications list displays all available email notification templates in your system. You can access this list from the main navigation menu.

List Features

Search Functionality

List of notification to send  NEW

Subject	Name	For whom	Description	Status	Options
\$(typeTest.name) Testing Activ...	mis REQUESTED INCOMPLETE	REQUESTED	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis REQUESTED COMPLETE	REQUESTED	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_INTERNAL INCOMPLETE	STAKEHOLDER_INTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_INTERNAL COMPLETE	STAKEHOLDER_INTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_EXTERNAL INCOMPLETE	STAKEHOLDER_EXTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_EXTERNAL COMPLETE	STAKEHOLDER_EXTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_VENDOR INCOMPLETE	STAKEHOLDER_VENDOR	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_VENDOR COMPLETE	STAKEHOLDER_VENDOR	The same template for MIS test types	ENABLED	
The Random *\$(randomPool.name)...	Random REQUESTED INCOMPLETE	REQUESTED	Template for creating Random	ENABLED	
The Random *\$(randomPool.name)...	Random REQUESTED INCOMPLETE	STAKEHOLDER_INTERNAL	Template for creating Random	ENABLED	











The search bar at the top of the list allows you to search across multiple fields:

- **Notification Name:** Search by the name of the notification
- **Subject:** Search by email subject line
- **For whom:** Search by recipient type
- **Description:** Search within notification descriptions

How to use:

1. Type your search term in the search field
2. Press Enter or click outside the field
3. The list will automatically filter to show matching results
4. To clear the search, delete all text from the search field

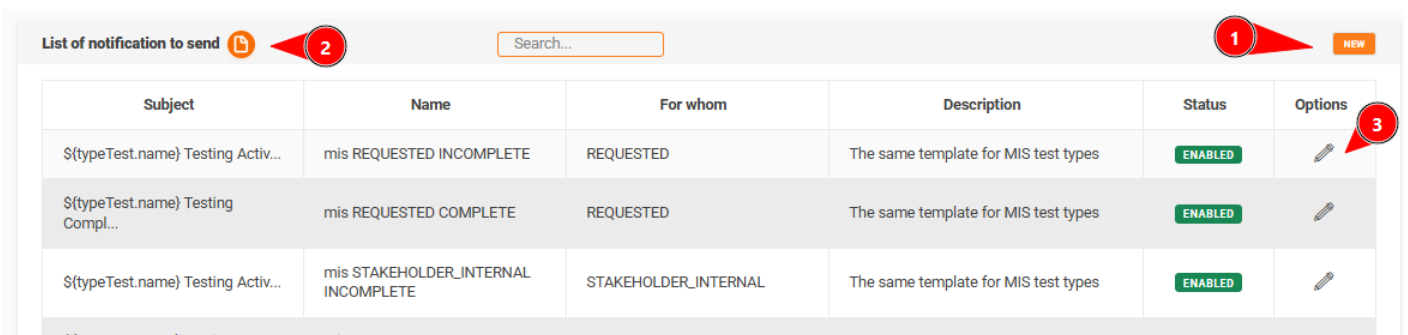
Table Columns




Subject	Name	For whom	Description	Status	Options
\$(typeTest.name) Testing Activ...	mis REQUESTED INCOMPLETE	REQUESTED	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis REQUESTED COMPLETE	REQUESTED	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_INTERNAL INCOMPLETE	STAKEHOLDER_INTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_INTERNAL COMPLETE	STAKEHOLDER_INTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_EXTERNAL INCOMPLETE	STAKEHOLDER_EXTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_EXTERNAL COMPLETE	STAKEHOLDER_EXTERNAL	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_VENDOR INCOMPLETE	STAKEHOLDER_VENDOR	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis STAKEHOLDER_VENDOR COMPLETE	STAKEHOLDER_VENDOR	The same template for MIS test types	ENABLED	

The list displays the following information:

- **Subject:** The email subject line (truncated if longer than 30 characters)
- **Name:** The notification template name
- **For whom:** The recipient category for this notification
- **Description:** A brief description of the notification (truncated if longer than 50 characters)
- **Status:** Shows whether the notification is **Enabled** (green) or **Disabled** (red)

Actions Available



Subject	Name	For whom	Description	Status	Options
\$(typeTest.name) Testing Activ...	mis REQUESTED INCOMPLETE	REQUESTED	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Compl...	mis REQUESTED COMPLETE	REQUESTED	The same template for MIS test types	ENABLED	
\$(typeTest.name) Testing Activ...	mis STAKEHOLDER_INTERNAL INCOMPLETE	STAKEHOLDER_INTERNAL	The same template for MIS test types	ENABLED	

1. **New Button:** Located in the top right corner, allows you to create a new email notification
2. **Documentation Button:** Located next to the "List of notification to send" title, provides access to additional documentation
3. **Edit Action:** Each row has an edit icon (pencil) in the Options column that allows you to modify the notification

Pagination

The list supports pagination to navigate through multiple pages of notifications. Use the pagination controls at the bottom of the table to move between pages.

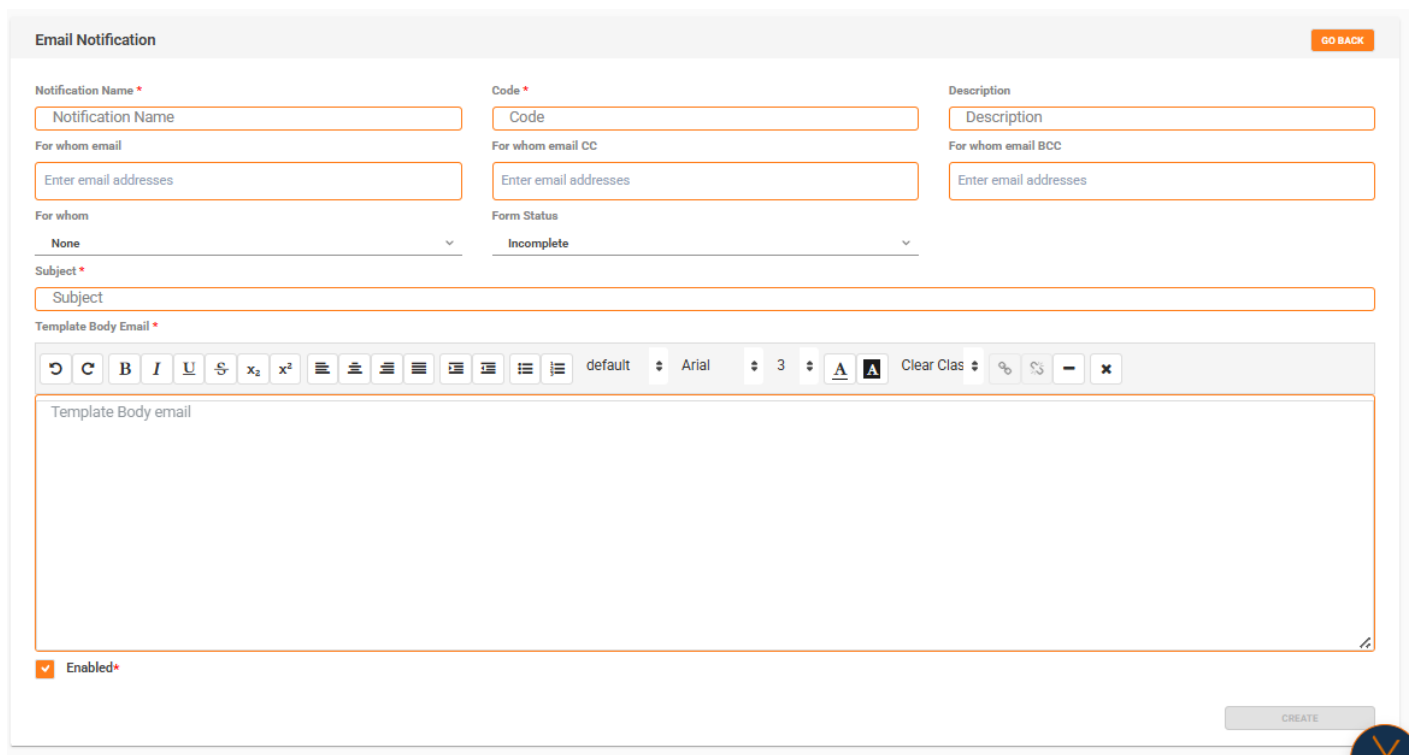
Creating a New Email Notification

Step 1: Access the Creation Form

NEW

1. From the Email Notifications list, click the **New** button in the top right corner
2. You will be redirected to the creation form

Step 2: Fill Required Fields



The screenshot shows the 'Email Notification' creation form. It features a header with 'Email Notification' on the left and a 'GO BACK' button on the right. The form is divided into several sections: 'Notification Name *' with a text input field; 'Code *' with a text input field; 'Description' with a text input field; 'For whom email' with a text input field; 'For whom email CC' with a text input field; 'For whom email BCC' with a text input field; 'For whom' with a dropdown menu set to 'None'; 'Form Status' with a dropdown menu set to 'Incomplete'; 'Subject *' with a text input field; and 'Template Body Email *' with a rich text editor. The rich text editor includes a toolbar with icons for undo, redo, bold, italic, underline, strikethrough, subscript, superscript, bulleted list, numbered list, link, unlink, and clear class, along with font and size settings. Below the editor is a 'Template Body email' text area and an 'Enabled *' checkbox which is checked. A 'CREATE' button is located at the bottom right of the form.

The following fields are **required** and must be filled before you can save:

Notification Name

- Enter a descriptive name for your notification
- This name will appear in the notifications list
- Example: "Driver License Expiration Reminder"

Code

- Enter a unique code for the notification
- **Rules:**

- Only uppercase letters (A-Z) and underscores (_) are allowed
- Example: `DRIVER_LICENSE_EXPIRATION`
- **Note:** This code must be unique across all notifications
- The field automatically converts lowercase letters to uppercase

Subject

- Enter the email subject line
- This is what recipients will see in their email inbox
- Example: "Your Driver License is About to Expire"

Template Body Email

- Enter the content of the email body in text format.
Example: Hello:
Your driver's license will expire soon. Please renew it.

Step 3: Fill Optional Fields

Description

- Provide additional information about the notification
- This helps identify the notification's purpose
- Optional field

For whom email

- Enter email addresses that will receive this notification
- You can add multiple email addresses
- Click Enter or comma after each email address
- Valid email format is required

For whom email CC

- Enter email addresses for carbon copy recipients
- Multiple emails can be added
- Optional field

For whom email BCC

- Enter email addresses for blind carbon copy recipients
- Multiple emails can be added
- Optional field

For whom

- Select the recipient category from the dropdown

- Options may include: None, Employee, Manager, etc.
- Default value is "None"
- Optional field

Form Status

- Select the form status that triggers this notification
- Available options:
 - **Complete:** Notification sent when form status is Complete
 - **Incomplete:** Notification sent when form status is Incomplete
- **Default:** Incomplete (automatically selected for new notifications)
- **Important:** This setting affects when Result Test options become available (see Result Test Selection section)

Enabled

- Checkbox to enable or disable the notification
- **Default:** Enabled (checked)
- When disabled, the notification will not be sent even if conditions are met

Step 4: Save the Notification

CREATE

1. Review all entered information
2. Ensure all required fields are filled
3. Click the **CREATE** button
4. A success message will appear confirming the notification was created
5. After creation, the form will switch to edit mode and the **Service/Form Type** section will become available

Editing an Existing Email Notification

Step 1: Access the Edit Form



1. From the Email Notifications list, click the **edit icon** (pencil) in the Options column for the notification you want to modify
2. You will be redirected to the edit form with all current values pre-filled

Step 2: Modify Fields

The screenshot shows the 'Email Notification' configuration interface. At the top right is a 'GO BACK' button. The form is divided into several sections:

- Notification Name:** 'mis REQUESTED INCOMPLETE'
- Code:** 'COMMON_REQUESTED_INCOMPLETE' (disabled)
- Description:** 'The same template for MIS test types'
- For whom email:** 'Enter email addresses'
- For whom email CC:** 'Enter email addresses'
- For whom email BCC:** 'Enter email addresses'
- For whom:** 'Requested' (dropdown)
- Form Status:** 'Incomplete' (dropdown)
- Subject:** '{typeTest.name} Testing Activated'
- Template Body Email:** A rich text editor containing the text: '\$(employee.name) \$(employee.lastName) (\$(employee.identification)) has been selected for \$(typeTest.name) testing.'
- Enabled:** A checked checkbox.

An 'EDIT' button is located in the bottom right corner of the form area.

- You can modify any field except the **Code** field (which is disabled in edit mode)
- All validation rules still apply
- Required fields must still be filled

Step 3: Save Changes



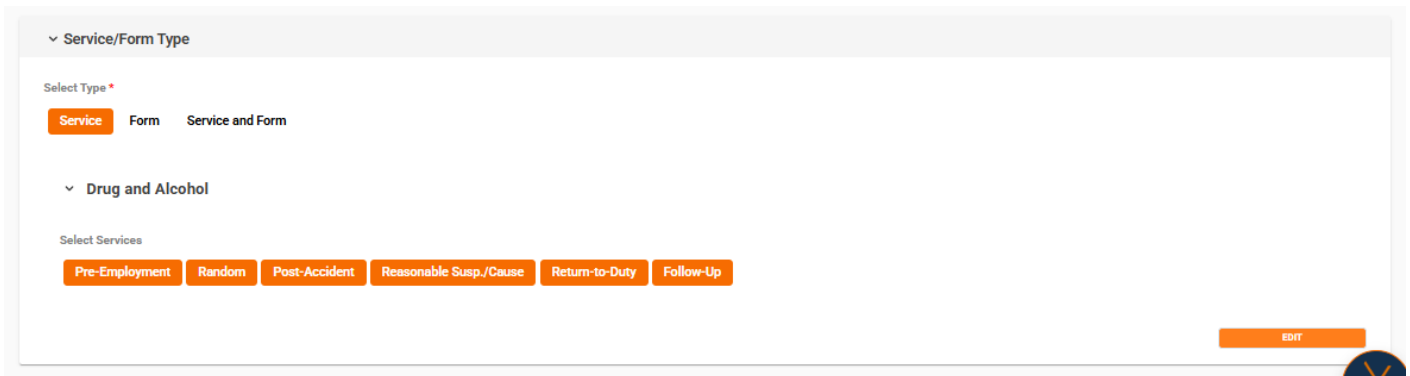
1. Make your desired changes
2. Click the **EDIT** button to save
3. A success message will confirm your changes were saved

Important Notes for Editing

- **Code field:** Cannot be changed after creation (field is disabled)
- **Service/Form Type:** Can be configured after the notification is saved (see Configuring Service/Form Type section)
- **Form Status changes:** If you change Form Status from Complete to Incomplete, all previously selected Result Tests will be automatically deleted

Configuring Service/Form Type

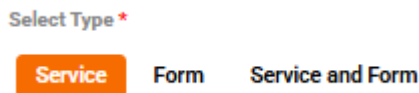
When Can You Configure Service/Form Type?



The screenshot shows a configuration window titled "Service/Form Type". It features a "Select Type *" section with three buttons: "Service" (highlighted in orange), "Form", and "Service and Form". Below this is a "Drug and Alcohol" section with a dropdown arrow. Underneath is a "Select Services" section with six buttons: "Pre-Employment", "Random", "Post-Accident", "Reasonable Susp./Cause", "Return-to-Duty", and "Follow-Up". An "EDIT" button is located in the bottom right corner.

The Service/Form Type configuration is **only available after you have saved the notification** (either created or edited). This section appears below the main notification form.

Step 1: Select Service/Form Type



This close-up shows the "Select Type *" section with three buttons: "Service" (highlighted in orange), "Form", and "Service and Form".

You must first select one of three types:

1. **Service:** Select specific services that will trigger this notification
2. **Form:** Select specific forms that will trigger this notification
3. **Service and Form:** Select both services and their associated forms

Click on the desired type button. The button will highlight to show it's selected.

Step 2: Configure Based on Selected Type

If You Selected "Service"

Service/Form Type

Select Type *

Service Form Service and Form

Drug and Alcohol

Select Services

Pre-Employment Random Post-Accident Reasonable Susp./Cause Return-to-Duty Follow-Up

1. The system will display all available modules
2. Click on a module name to expand it and see available services
3. Click on service buttons to select/deselect them
4. Selected services will be highlighted
5. You can select services from multiple modules

If You Selected "Form"

Service/Form Type

Select Type *

Service Form Service and Form

Drug and Alcohol

Select Forms

Custody and Control Form - CCF Alcohol Testing Form Return to Work Slip Notification of Selection for Random Test

1. The system will display all available modules
2. Click on a module name to expand it and see available forms
3. Click on form buttons to select/deselect them
4. Selected forms will be highlighted
5. **Result Test cards** will appear below selected forms if:
 - Form Status is set to "Complete"
 - The form has associated Result Tests
 - (See Result Test Selection section for details)

If You Selected "Service and Form"

1. The system will display all available modules
2. Click on a module name to expand it
3. You'll see services listed first
4. Click on service buttons to select/deselect services
5. For each selected service, expand it to see associated forms
6. Click on form buttons to select/deselect forms for each service
7. Use the **All/None** button to quickly select or deselect all forms for a specific service
8. **Result Test cards** will appear below selected forms if:
 - Form Status is set to "Complete"
 - The form has associated Result Tests
 - (See Result Test Selection section for details)

Step 3: Save Service/Form Configuration

EDIT

1. After making your selections, scroll to the bottom of the Service/Form Type card
2. Click the **SAVE** button (for new configurations) or **EDIT** button (for existing configurations)
3. A success message will confirm your configuration was saved
4. The system will reload to show your saved selections

Important Notes

- You **must** select a Service/Form Type before you can save the configuration
- If you try to save without selecting a type, you'll see an error message

- You can change the Service/Form Type at any time, but you'll need to reconfigure your selections
- Your previous selections are saved when you switch between types

Result Test Selection

When Do Result Test Cards Appear?

The screenshot shows the 'Email Notification' configuration page. The 'Form Status' dropdown menu is set to 'Complete', which is highlighted with a red arrow. The page includes fields for Notification Name, Code, Description, For whom email, For whom email CC, For whom email BCC, For whom, Subject, and Template Body Email. A 'GO BACK' button is in the top right, and an 'EDIT' button is in the bottom right.

Result Test cards appear automatically when **all** of the following conditions are met:

1. **Form Status** is set to "**Complete**" (not "Incomplete")
2. **Service/Form Type** is set to either "**Form**" or "**Service and Form**" (not "Service")
3. A **form is selected** in the Service/Form Type configuration
4. The selected form **has associated Result Tests** in the system

If any of these conditions are not met, the Result Test card will not appear.

How to Use Result Test Cards

1. When a form is selected and conditions are met, a **Result Test** card appears below the form button
2. The card displays all available Result Tests for that specific form
3. Click on Result Test buttons to select/deselect them
4. Selected Result Tests will be highlighted (active state)
5. You can select multiple Result Tests for each form
6. Each form has its own independent set of Result Test selections

Saving Result Test Selections

- Result Test selections are **automatically included** when you save the Service/Form Type configuration
- Click the **SAVE** or **EDIT** button in the Service/Form Type section
- Your Result Test selections will be saved along with your Service/Form selections
- When you edit the notification later, your Result Test selections will be restored

Field Descriptions

Required Fields

Field	Description	Format/Notes
Notification Name	A descriptive name for the notification	Text, any characters

Field	Description	Format/Notes
Code	Unique identifier for the notification	Uppercase letters and underscores only (e.g., <code>DRIVER_LICENSE</code>)
Subject	Email subject line	Text, appears in recipient's inbox
Template Body Email	Email body content	HTML format required (e.g., <code><p>Content</p></code>)

Optional Fields

Field	Description	Format/Notes
Description	Additional information about the notification	Text, optional
For whom email	Primary recipient email addresses	Multiple emails, comma or Enter separated
For whom email CC	Carbon copy recipient email addresses	Multiple emails, comma or Enter separated
For whom email BCC	Blind carbon copy recipient email addresses	Multiple emails, comma or Enter separated
For whom	Recipient category	Dropdown selection, default: "None"
Form Status	Status that triggers the notification	Options: Complete, Incomplete (default: Incomplete)
Enabled	Enable/disable the notification	Checkbox, default: Enabled (checked)

Validations and Rules

Field Validations

- Notification Name:** Required, cannot be empty
- Code:**
 - Required, cannot be empty
 - Only uppercase letters (A-Z) and underscores (`_`) allowed
 - Must be unique (cannot duplicate existing codes)
 - Automatically converts to uppercase
- Subject:** Required, cannot be empty
- Template Body Email:**
 - Required, cannot be empty
 - Plain text is sufficient

Email Address Validations

- All email fields (For whom email, CC, BCC) must contain valid email format
- Multiple emails can be entered, separated by comma or Enter key
- Invalid email formats will be rejected

Service/Form Type Validations

- Service/Form Type configuration can only be saved **after** the notification is created
- You **must** select a Service/Form Type (Service, Form, or Service and Form) before saving the configuration
- If you try to save without selecting a type, you'll receive an error message: "Please select a Service/Form Type before saving"

Error Messages

Common error messages you may encounter:

- **"The code already exists. Please use a different code."**: The Code you entered is already in use by another notification
 - **"Please save the notification template first before configuring services and forms."**: You're trying to configure Service/Form Type before saving the notification
 - **"Please select a Service/Form Type before saving."**: You're trying to save Service/Form configuration without selecting a type
 - **"An error occurred while saving..."**: General error, check your input and try again
-

Common Workflows

Workflow 1: Create a Complete Notification with Service Selection

1. Click **New** from the Email Notifications list
2. Fill in all required fields (Name, Code, Subject, Template Body Email)
3. Set **Form Status** to "Complete" or "Incomplete" as needed
4. Fill optional fields as desired
5. Check **Enabled** if you want the notification active
6. Click **CREATE**
7. After creation, scroll to **Service/Form Type** section
8. Select **Service** type

9. Expand modules and select desired services
10. Click **SAVE** in the Service/Form Type section
11. Your notification is now fully configured

Workflow 2: Create a Notification with Form and Result Tests

1. Click **New** from the Email Notifications list
2. Fill in all required fields
3. **Important:** Set **Form Status** to "**Complete**" (required for Result Tests)
4. Fill optional fields
5. Click **CREATE**
6. In **Service/Form Type** section, select **Form** type
7. Expand modules and select desired forms
8. **Result Test cards** will appear below selected forms (if forms have Result Tests)
9. Select desired Result Tests by clicking on them
10. Click **SAVE** in the Service/Form Type section
11. Both form selections and Result Test selections are saved

Workflow 3: Edit and Modify Service/Form Configuration

1. From the list, click **edit icon** for the notification
2. Modify any fields as needed (except Code)
3. Click **EDIT** to save changes
4. Scroll to **Service/Form Type** section
5. Modify your service/form selections as needed
6. If Form Status is "Complete" and you have forms selected, modify Result Test selections
7. Click **EDIT** (or **SAVE**) in the Service/Form Type section
8. Changes are saved

Workflow 4: Disable a Notification

1. From the list, click **edit icon** for the notification
 2. Uncheck the **Enabled** checkbox
 3. Click **EDIT**
 4. The notification status will change to "Disabled" in the list
 5. The notification will not be sent even if conditions are met
-

Tips and Best Practices

Naming Conventions

- Use descriptive names for notifications (e.g., "Driver License Expiration - 30 Days Before")
- Use clear, consistent codes (e.g., `DRIVER_LICENSE_30_DAYS`)
- Include dates or timeframes in names when relevant

Email Content

- Use plain text
- Keep subject lines concise and clear
- Consider including relevant information that recipients need

Service/Form Selection

- Select only the services/forms that truly need this notification
- Review your selections before saving
- Remember that Result Tests only appear for "Complete" status

Result Test Selection

- Only select Result Tests that are relevant to your notification purpose
- Remember that changing Form Status to "Incomplete" will delete all Result Test selections
- If you need Result Tests, always keep Form Status as "Complete"

Testing

- After creating a notification, verify it appears correctly in the list
 - Check that all selected services/forms are saved correctly
 - If using Result Tests, verify they appear and can be selected when conditions are met
-

Troubleshooting

Result Test Cards Not Appearing

Possible causes:

1. Form Status is set to "Incomplete" → Change to "Complete"
2. Service/Form Type is set to "Service" → Change to "Form" or "Service and Form"
3. No form is selected → Select a form first
4. The selected form has no Result Tests associated → Result Tests may not exist for this form in the system

Cannot Save Service/Form Configuration

Possible causes:

1. Notification hasn't been saved yet → Save the notification first (CREATE button)
2. No Service/Form Type selected → Select Service, Form, or Service and Form first
3. No selections made → Select at least one service or form

Code Already Exists Error

- The Code you entered is already used by another notification
- Solution: Use a different, unique code
- Remember: Codes are case-sensitive and must be uppercase

Template Body Email Not Saving

- Include plain, unformatted text so it doesn't cause problems

Summary

The Email Notification module provides a comprehensive system for creating and managing email notifications. Key points to remember:

- **Required fields** must be filled before saving
- **Service/Form Type** configuration is only available after saving the notification
- **Result Test cards** appear when Form Status is "Complete" and appropriate forms are selected
- **Form Status changes** to "Incomplete" will delete all Result Test selections
- **Code field** cannot be changed after creation
- Always verify your configuration before finalizing

For additional support or questions, refer to the documentation button in the Email Notifications list or contact your system administrator.

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