

What It Does

With the System Email function, you can send a pre-designed email to one or more of your learners right through QualityTrainingPortal.

System Emails Improve Training Effectiveness

- Improve training completion rates with reminder emails.
- Build more accountability into training. “I forgot about the training,” is no longer an excuse.
- Provide encouragement and positive feedback to learners by emailing them congratulations when training has been completed on time.
- Achieve training goals and increase your training ROI.

What Is Required

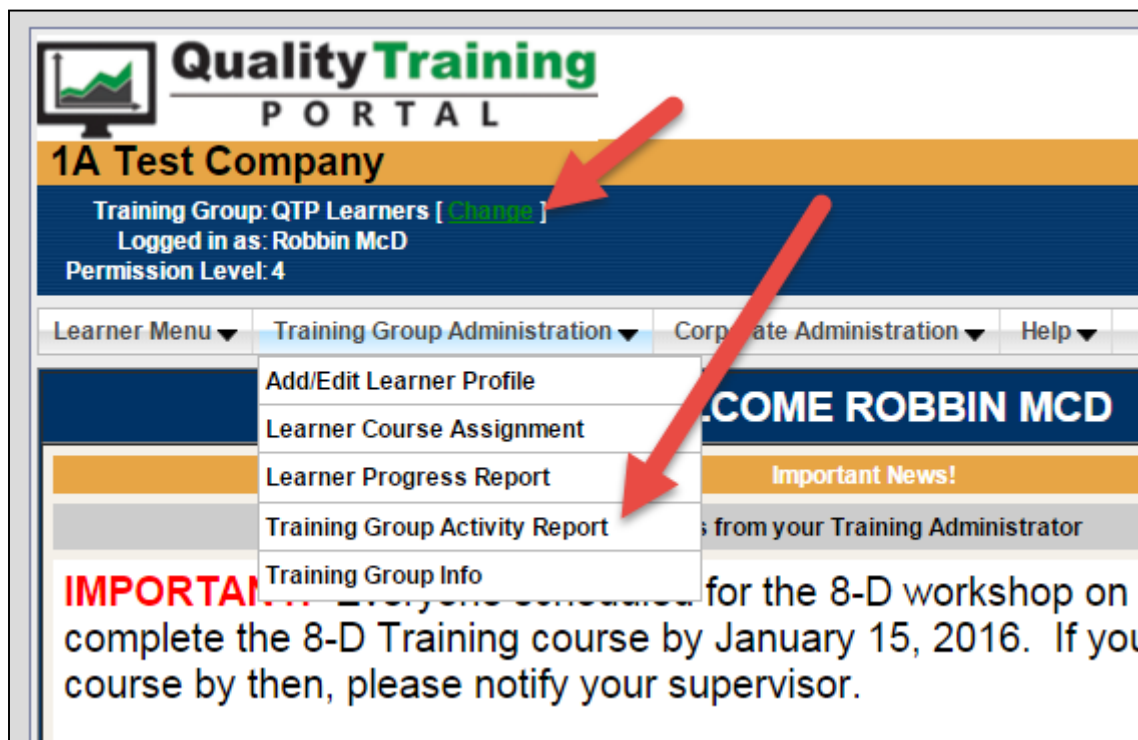
You will work with the support team at QualityTrainingPortal to develop one or more custom emails that will be available to send to your learners. You can start with just one email and add more later if you wish.

Ways to Use System Emails

1. Remind learners about incomplete training.
2. Remind learners about past due training.
3. Congratulate learners for completing training.
4. Invite learners to sign up for additional training.

How to Send System Emails

System Emails are sent from the Training Group Activity Report. To run that report, go to the Training Group Administration Tab and select Training Group Activity Report.



The screenshot shows the Quality Training Portal interface. At the top, there is a logo for Quality Training Portal and the text "1A Test Company". Below this, it says "Training Group: QTP Learners [Change]" and "Logged in as: Robbin McD" with "Permission Level: 4". There are four main navigation tabs: "Learner Menu", "Training Group Administration", "Corporate Administration", and "Help". The "Training Group Administration" tab is selected, and its dropdown menu is open, showing options: "Add/Edit Learner Profile", "Learner Course Assignment", "Learner Progress Report", "Training Group Activity Report", and "Training Group Info". A red arrow points to the "Training Group Administration" tab, and another red arrow points to the "Training Group Activity Report" option in the dropdown menu. Below the navigation, there is a "WELCOME ROBBIN MCD" message and an "Important News!" section with a red "IMPORTANT" header. The news text reads: "Everyone interested for the 8-D workshop on... complete the 8-D Training course by January 15, 2016. If you course by then, please notify your supervisor."

If you are the **Primary Training Group Administrator** for multiple Training Groups, you will need to **CHANGE** into the Training Group you wish to send the emails to and then follow these instructions.

If you are a **Corporate Administrator**, you can send emails to everyone in your Corporate Account through the Corporate Activity Report on the Corporate Administration Tab. You can also send system emails through the Training Group Administration Tab, but you will only be able to send them to people in the Training Group you are in. To send to a different Training Group, you will need to **CHANGE** into that Training Group

How to Send System Emails

There are TWO Steps to sending out System emails:

1. Run a report and;
2. Select who in the report will receive an email and then send.

Quality Training PORTAL

Good Afternoon!
It's January 28, 2016

1A Test Company

Training Group: Engineering Department
Logged in as: Ray Mikulak
Permission Level: Training Group Administrator

Learner Menu Training Group Administration Help

TRAINING GROUP ENGINEERING DEPARTMENT REPORT

If you have any questions on how to run reports, roll your mouse over the ToolTips image, review the [How-To Guide](#) on QualityTrainingPortal or [contact us](#).

Show me any records...

Based on the Date the Training was Assigned

With courses assigned within the date range
 With courses Not Started or In Progress that were assigned within the date range

Based on the Expected Completion Date of the Training

With training due within the date range and that is Complete
 With training due within the date range and that is Not Started or In Progress

Based on Training Activity

With training activity by learners within the date range
 With training completed within the date range

Select a Date Range

From Date: Jan 28 2016
To Date: Jan 28 2016

Additional Report Criteria

Course: All Courses

Check to Include Course Scores in the Report

System Emails

Select the Email: No email View Selected Email

List Learners once in the Report

Run Report

If you don't see System Emails option, System Emailing hasn't been set up yet for your account. Contact QualityTrainingPortal to set-up your custom emails.

Running the Report

You will have LOTS of options and you will make your selections based on the purpose of your email.

Quality Training PORTAL

Good Afternoon!
It's January 28, 2016

1A Test Company

Training Group: Engineering Department
Logged in as: Ray Mikulak
Permission Level: Training Group Administrator

Learner Menu ▾ Training Group Administration ▾ Help ▾

TRAINING GROUP ENGINEERING DEPARTMENT REPORT

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Show me any records...

Based on the Date the Training was Assigned

- With courses assigned within the date range
- With courses Not Started or In Progress that were assigned within the date range

Based on the Expected Completion Date of the Training

- With training due within the date range and that is Complete
- With training due within the date range and that is Not Started or In Progress

Based on Training Activity

- With training activity by learners within the date range
- With training completed within the date range

Select a Date Range

From Date: Jan 21 2016

To Date: Jan 21 2016

Additional Report Criteria

Course: All Courses

Check to Include Course Scores in the Report.

System Emails

Select the Email: No email View Selected Email

List Learners once in the report

Run Report

If you have any questions on how to run reports, roll your mouse over the ToolTips image review the [How-To Guide](#) on QualityTrainingPortal or [contact us](#).

Show me any records...

Based on the Date the Training was Assigned

- With courses assigned within the date range
- With courses not started or incomplete that were assigned within the date range.

Based on the Expected Completion Date of the Training

- With training due within the date range and that is completed
- With training due within the date range and that is not started or in progress

Based on Training Activity

- With training activity by learners within the date range
- With training completed within the date range

Select a Date Range

From Date: Jan 21 2016

To Date: Jan 21 2016

Additional Report Criteria

Course: All Courses

Check to Include Course Scores in the Report.

System Emails

Select the Email: No email View Selected Email

List Learners once in the report

Run Report

Make your selection based on the objective of your email. The ToolTips (question marks beside each of the options) will give you tips regarding why you might use each of the various options. Chose one of these 6 options.

Running the Report

The date range you select is defined by your report selection above.

Select a Date Range

From Date: Jan 21 2016

To Date: Jan 21 2016

Additional Report Criteria

Course: All Courses

Check to Include Course Scores in the Report.

Choose a date range.

It is unlikely that you will need the test scores if you are running the report to send emails, so you probably will not check this option, but you can if you want that information in your report.

The report will take longer to run with this option checked.

In some cases, you might only be interested in certain courses so this option could make your report more manageable.

CORP ACTIVITY REPORT

If you have any questions on how to run reports, roll your mouse over the ToolTips image or review the [step-by-step tour](#) on QualityTrainingPortal or [contact us](#).

Show me any records...

Based on the Date the Training was Assigned

Based on Training Completion Date of the Training

Based on Training Activity

Select a Date Range

From Date: Jan 21 2016

To Date: Jan 21 2016

Additional Report Criteria

Course: All Courses

Check to Include Course Scores in the Report.

System Emails

Select the Email: No email | View Selected Email

List Learners once in the report

Run Report

Running the Report

If you don't have the System Email section, it is because you haven't had system emails set up yet. Contact the QualityTrainingPortal support team to set up your custom emails.

Select an email from the drop down list.

Don't worry - emails will not get sent out until you hit the send button which is in the next step. At this point, you are just listing everyone who fits your criteria. However, you **MUST** select an Email to send in this step to let the system know you plan to send emails so it can format the report so you can select email recipients.

Use the View Selected Email button to review the email before sending and to confirm it is the one you wish to send. NOTE: At this stage, because the actual learner data hasn't been loaded, it will not show up in the email view. For example, if your email starts with Dear Mary, at this point, it will just say Dear ,

When you are ready, run the report. Don't worry if you don't get the information you expected, you can always run the report again.

The screenshot displays the 'CORP ACTIVITY REPORT' interface. The 'System Emails' section is highlighted in yellow and includes a dropdown menu currently set to 'No email', a 'View Selected Email' button, and a 'Run Report' button. A yellow arrow points from the 'View Selected Email' button to a larger inset window showing a preview of an email template. The inset window has a title bar 'CORP ACTIVITY REPORT' and a 'Run Report' button at the bottom. The main interface also has a 'Run Report' button at the bottom center. The background shows a list of courses and a 'Check to Include Course Scores in the Report' checkbox.

Report Results

Depending on how many records fit your criteria you will get a short or long report. If this report doesn't show what you are looking for, you can run the report again. If the report does meet your needs, you can now decide who you wish to send an email to.

CORP ACTIVITY REPORT													
Identifier	Last Name	First Name	Username	Training Group	Supervisor	Course Name	Added	Started	Target Completion Date	Last Accessed	Completion Status	Completion Date	E-Mail
	Filter: All		Filter: All	Filter: All	Filter: All	Filter: All					Filter: All		Select All
McDermott	Robin	Tyler	tyermcd@reseng.com	Engineering Department	Ray Mikulak	Advanced Control Charts	2015-12-20		2016-01-19		Not Started		robinemcd@gmail.com
Gromoll	Jed		rogromol@reseng.com	Engineering Department		Introduction to Lean Six Sigma	2015-12-16	2016-01-11	2016-01-16	2016-01-11	In Progress		jgromoll@reseng.com
Mikulak	Ray	Raym	raym@reseng.com	Engineering Department		Introduction to Mistake-Proofing	2015-12-20		2016-01-16		Not Started		raym@reseng.com
Abbott	Anthony		anthony.abbott@reseng.com	Engineering Department		8D Problem-Solving	2015-12-15		2016-01-15		Not Started		anthony.abbott@reseng.com
Brennan	Jake		jake.brennen@reseng.com	Engineering Department		Role of a Lean Six Sigma Champion	2015-12-21	2016-01-04	2016-01-02	2016-01-08	Completed	2016-01-08	jake.brennen@reseng.com

You can filter the report, for example, to see all learners who haven't completed their training. However, when you use the filter function, any email addresses that have been checked will be unchecked and the option to Select All in the email column will be disabled and you will need to select learners one-by-one.

Started	Target Completion Date	Last Accessed	Completion Status	Completion Date	E-Mail
			Filter: All		<input type="checkbox"/> Select All
			Not Started		<input type="checkbox"/> robinemcd@gmail.com
	2016-01-19	2016-01-11	In Progress		<input type="checkbox"/> jgromoll@reseng.com
	2016-01-19		Not Started		<input type="checkbox"/> raym@reseng.com
	2016-01-15		Not Started		<input type="checkbox"/> anthony.abbott@reseng.com
2016-01-04	2016-01-02	2016-01-08	Completed	2016-01-08	<input type="checkbox"/> jake.brennen@reseng.com

Select ALL if you want all learners in the report selected. Otherwise, manually check off those you wish to receive emails.

Send the Emails

When you are happy with the email addresses you have selected, you are ready to hit the send button! Scroll to the bottom of the screen and hit the Send Emails button.

To Send System Emails

1. Check each email address you wish to send the email to in the "EMail" column in the report OR use the "Select All" check box to select all email addresses.
2. When you are happy with the list of emails you have selected, click the "Send EMail" button below. Emails will be sent immediately.

IMPORTANT: If you apply any filters in the displayed report after checking email addresses, all checked email addresses will become unchecked and the "Select All" option is disabled.

Run Report Send EMail

When you hit the send button, emails will go out immediately.

The screenshot shows the Quality Training Portal interface. At the top, it says "Good Afternoon! It's January 21, 2016". Below that is the "CORP ACTIVITY REPORT" table. The table has columns for Identifier, Last Name, First Name, Username, Training Group, Supervisor, Course Name, Started Date, Target Completion Date, Last Accessed, Completion Status, Completion Date, and EMail. There are several rows of data. Below the table, there are various filters and options, including "Show me any records...", "Based on the Date the Training was Assigned", "Based on the Expected Completion Date of the Training", "Based on Training Activity", "Select a Date Range", "Additional Report Criteria", and "System Emails". At the bottom, there is a "To Send System Emails" section with instructions and a "Send EMail" button.