

Email notifications and triggers

This document contains a table with all the all the emails that Webonboarding automatically sends to users with the triggers that cause those emails to send.

Email	Frequency	Trigger
Welcome to onboarding; offer is available to onboarder	Once and immediate	Onboarder contract and offer authorised by HR and/or manager for the first time or resent by HR
Amended offer is available to onboarder	Once and immediate	Regenerated contract and offer have been authorised by HR and/or manager
Start date confirmed by the onboarder	Once and immediate	Onboarder confirms their start date
Request a manager sign-off an offer	Once and immediate	Offer Authorised or created by HR (When Manager is authoriser)
Onboarder requested a change to the start date	Once and immediate	Onboarder requests to change the start date
Offer authorisation rejected by manager	Once and immediate	Manager rejects a generated and HR-authorised contract and offer
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Offer authorisation rejected by manager	Once and immediate	Manager rejects a generated and HR-authorised contract and offer
Reading items made available to onboarder	Once and immediate	Onboarder confirms their start date
Welcome email to new employee	Once and immediate	A week before start date or confirming start date if less than 7 days
Reminder for the Manager or HR to sign-off the offer	Scheduled and recurring daily after date of creation of offer	A day after offer created until offer authorised or rejected

Reminder for Onboarder to confirm their start date	Scheduled and recurring daily	Start date is a week or less away and still unconfirmed by Onboarder
Email reminder to manager/HR regarding tasks	Scheduled and recurring daily	User has outstanding tasks at time of schedule running
Request to reset your password	Once and immediate	Any user requests password reset
Onboarder start date change request approved	Once and immediate	HR approve start date change request
Onboarder start date change request rejected	Once and immediate	HR reject start date change request
Onboarder reading items Completed	Once and immediate	Onboarder clicks to complete the induction
Password ready	Once and immediate	Onboarder contract and offer authorised by HR and/or manager for the first time or resent by HR
Onboarder login reminder	Scheduled and recurring daily	One day after initial email and not logged in for first time
Onboarding process completed	Once and immediate	Onboarder completes process
Message notification	Once and immediate/daily digest	Message is sent to offline user
Message reminder	Scheduled and recurring daily	Unread messages remain for users
Onboarder contract signed	Once and immediate/daily digest	Onboarder completes contract signing process
Onboarder mandatory documents completed	Once and immediate/daily digest	Onboarder completes mandatory documents
Onboarder registers interest in course	Once and immediate/daily digest	Onboarder uses "Book" button on a course
Onboarder references completed	Once and immediate/daily digest	Onboarder completes references
Imported Onboarders to process	Scheduled and recurring daily	Import batches that contain onboarder data remain in the system
Scheduled Exports are ready to view	Once and immediate	A scheduled Export has been run by the system

Cascade API Sync Error	Scheduled	When Cascade integration is on and an error occurs in transfer.
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