Due Dates and Notifications

What can I do with the Due Dates and Notifications module?

Set due dates for pathway steps

Due dates can be set for pathway steps based on the condition selected for the plan.

Setup notifications to be sent for pathway steps

- Notify a learner via SMS or email.
- Set if a notification should be sent for a pathway step.
- Set Reminder notifications to be sent.

Send a summary email

Send an email that contains an overview of the steps and their respective due dates.

Create Due Date plans for pathways

Create a Due Date plan for a pathway and specify the:

- Plan owner
  - Wet who is responsible for the plan
- Recipients
  - Set who is included in the plan
- Condition for the plan:
  - Appointment Requirement
  - Specific Date
  - Training Requirement
- Notification Schedule
  - Set when notifications will be sent

Simulate a Due Date plan

Select a simulated start date to confirm the due dates set make sense.

How to use the Due Dates and Notifications List

What needs to be ready before you start?

- Due Date and Notification rights for the user who should setup the plan;
- The pathway should be complete the step order should be finalized;
- Prerequisites should already be setup in the Pathway ;
- The Learners who should be included in the plan should already be on the Pathway Target Audience or in a Subgroup.

How did I get here?

From the portal click on System Administration | Modules | e-Learning | Due Dates and Notifications

What is the purpose of the Due Dates and Notifications list?

The Due Dates and Notifications screen can be seen as a Due Date Plan library. Due Date Plans can be created from this page and any Due Date Plans created on a specific pathway are displayed in this list.

The terms Due Date Plan and Notification Plan are used interchangeably in this article and throughout the module.

Search

The first time the page opens, the Search is Hidden. Click on the Show button to expand the search. If no plans have been created, the *No results found* message is displayed.

SignifyHR - Google Chrome
Image not found or type unknown

When a plan has been created, it is displayed in the table below the search. Search results are returned in the table to easily take action when the plan in question is found.

SignifyHR - Google Chrome
Image not found or type unknown

Table

The table contains a list of all Due Date Plans created on the current schema. The plan name, valid dates, plan condition, group, and status are displayed in the table. Actions which can be performed on the plan are also available when the Actions button is selected.

SignifyHR - Google Chrome
Image not found or type unknown

Table columns explained

Column Heading	Explained
Notification Plan	The name of the Notification Plan/Due Date Plan.
Notification Plan Valid Between	The Notification Plan period, the period within which notifications will be sent for the Due Date Plan.
Plan Condition	The Condition selected for the plan, there are three conditions available: • Appointment Requirement • Specific Date • Training Requirement
Group	The group selected to receive the notifications. This can be the Pathway Target Audience or a subgroup.
Status	The status of the Due Date Plan.

Due Date Plan Actions explained

There are several Actions available to manage a Due Date Plan:

- **Edit:** Edit the Due Date Plan details, the due dates, or set which notifications should be sent to the learner.
- **Delete:** Delete the Due Date Plan.
- **Details:** View the details of the Due Date Plan.
- **Copy:** Copy the Due Date plan for the same or another pathway.
- **Send Summary Email:** Sends a summary email of all the due dates and steps to the Due Date Plan group.
- **Due Date Simulation:** Simulate the Due Date Plan to confirm it is set up to notify learners on the desired dates.
- **Export Recipients:** Export the recipient list to see who was notified and included in the Due Date Plan.

Page Help

Refer to the Page Help option in the top right of the screen for a bit more information on what is assumed to be in place and what the next steps are in terms of a Due Date Plan.

SignifyHR - Google Chrome

Image not found or type unknown

> **Try it out:** Navigate to the **Due Dates and Notifications module** and see if there are any plans in the list.

How to add a Due Date Plan

Where can I add a Due Date Plan?

Due Date Plans can be added in two ways:

- from the Due Dates and Notifications list and
- from the pathway

The main difference is the navigation.

Adding a Due Date Plan from the Due Dates and Notifications List

How did I get here?

From the portal click on System Administration | Modules | e-Learning | Due Dates and Notifications

On the Due Dates and Notifications Screen, click on the +Due Date Plan button.

SignifyHR - Google Chrome
Image not found or type unknown

Adding a Due Date Plan from the Pathway

How did I get here?

From the portal click on System Administration | Modules | e-Learning | Learning Management | Maintain Learning Pathway

- Find the Pathway the Due Date plan should be created for.
- On the Pathway Preview tab, click the View Due Date Plans button.

SignifyHR - Google Chrome
Image not found or type unknown

Complete the General Tab Details

How can I quickly create a Due Date Plan?

When creating a Due Date Plan the fields listed below are mandatory:

- Pathway
- Plan Name
- Plan Owner
- Recipients - select either Target Audience or Group/Subgroup
- Conditions: Due date based on
- Schedule Run Days - select either Everyday or Week Days Only

To assist in reducing the details required when creating a plan, some fields are completed by default.

Plan Details section

SignifyHR - Google Chrome
Image not found or type unknown

Pathway

- If the plan is created from the Due Dates and Notifications list, the pathway needs to be selected.
- If the plan is created from the pathway, the pathway is pre-selected.

Active

- When all the plan details are completed and the due dates and notifications are configured set the plan to active to ensure notifications are sent to learners.
- Notifications will only be sent for active plans.

Plan Name

- To make it as easy as possible to create a plan, the Plan name is pre-populated with the name of the pathway and the words Due Date Plan at the end.
- The plan name can be changed.
- Make sure to use plan names that will make sense not only when creating the plan but long after the plan is used.

Plan Owner

- The plan owner has defaulted to the user who creates the plan.
- Any other user can be set as the plan owner.
- When selecting a plan owner, make sure the user has the Pathway Administrator Role and the Due Dates and Notifications permission on that role.
- The Plan Owner will be notified in the following cases:
  - When learners did not receive their Due Date Plan notifications
  - Changes were made to a pathway linked to a notification plan (excluding the step order changed)

Recipients section

Signify HR - Google Chrome
Image not found or type unknown

The next step when creating a Due Date Plan is selecting which group should receive the notifications.

Target Audience:

- When the Pathway has a Target Audience, the *Who is on Target Audience* report can be generated, to confirm all the learners are loaded on the Target Audience.

Group/Subgroup:

- Only one subgroup can be selected at a time.

Conditions section

SignifyHR - Google Chrome

Image not found or type unknown

Zoom: SignifyHR - Google Chrome

After selecting the Recipients, further conditions can be added to narrow down who is included in the Due Date Plan.

There are three conditions available. Each condition is elaborated on in separate articles, available using the links below.

Appointment Requirement Condition

Specific Date Condition

Training Requirement Condition

Notification Schedule

SignifyHR - Google Chrome

Image not found or type unknown

Notifications are only sent for active plans.

Notify Manager:

- When checked, the manager will receive an email indicating that the due date was missed by employees in their subgroup.

Schedule Run Days:

- Days on which the notifications should be sent.
- Notifications can be sent every day or on weekdays only.

> **Try it out:** Click on the + Due Date Plan button and create a plan for an existing pathway.

How to use the Appointment Requirement Condition

Appointment Requirement Condition

The Appointment Requirement condition has three options available.

- Start Date In Group
- Start Date In Position
- Start Date In Company

For each option, a number of days can be specified or a specific date can be set.

Where can I find the Start Date?

To View

SignifyHR - Google Chrome
Image not found or type unknown

To view the Start Date in Group/Company/Position Navigate to Manage Employees | Employee Profile | Personal Information. In the Appointment Information block, the Start Dates are displayed.

To Edit

To edit the Start Date in Group/Company/Position click on the Edit Appointment Information hyperlink. This will open the Appointment History of the learner. The appointment dates can be edited here.

When to use the Appointment Requirement Condition?

The Appointment Requirement condition is most often used for orientation/induction courses.

Start Date In Group

SignifyHR - Google Chrome
Image not found or type unknown

When the Start Date in Group is selected, a number of days can be specified or a specific date can be set.

Start Date In Company

SignifyHR - Google Chrome
Image not found or type unknown

When the Start Date in Company is selected, a number of days can be specified or a specific date can be set.

Start Date In Position

SignifyHR - Google Chrome
Image not found or type unknown

When the Start Date in Position is selected, a number of days can be specified or a specific date can be set.

> **Try it out:** When creating a new Due Date Plan, select the different Start Date options available before saving the plan.

How to use the Specific Date Condition

Specific Date Condition

SignifyHR - Google Chrome
Image not found or type unknown

When to use the Specific Date Condition?

When learners need to complete a course that starts on a specific date

---

Revision #1
Created 27 March 2021 08:23:01 by Lizette Lotter
Updated 27 March 2021 08:24:20 by Lizette Lotter