Email Alerts Documentation

Email Alerts V1.2

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Configure Email Alerts (only admins)

Before configuring the email alerts, make sure a sender has been designated. While not mandatory, it is recommended to add one sender in the Control Center configuration. This sender is added by the administrator, and will be the default sender when a new alert is created.

To see the option, go to the **External Modules – Module Manager**, once the module is activated, and click on *Configure*.

Once the Email Alerts module is activated, a **Configure Email Alerts** link will appear in the left hand tool bar. This is where creation and management of the emails are done.

Note: once the admin enables the module all users will see the link.

Creating a New Alert

The configuration table is a dropdown table that has several options available for users to customize before creating a new Email Alert.

Option	Field Mappings
Email Addresses	⬍
Email Content	⬍
Email Errors	⬍
	Save Settings

There are three sections:

1. Email Addresses
2. Email Content
3. Email Errors

• Email Addresses

Email Addresses are where the options related to the sender are found. Some of them enable buttons to use during the creation of a new email.

Note: If a variable is not predefined in the top configuration "pipping" will not work.

Note: the format is one variable per line.

Note: Button Name is the associated label name, chosen by the user, that the button will display in the Email Content section.

Data Pipping: Allows email fields from the REDCap form(s) to be piped into the TO and CC fields of email messages. Format must be [variable_name], Button Name

Preload Addresses: Enables autocomplete of email addresses in the TO and CC email fields. The list of email addresses is pulled from the specified variables in an already existing REDCap records. Format must be [email_variable], [email_variable_2], ...

Sender Email Name: Allows the user to set a default custom sender name for the email alerts. This only affects the sender name, not the sender email address, that will appear in the alert.

• Email Content

Email Content is where all the options related to the content of the email are located. These options enable buttons to use during the creation of a new email.

Note: If a variable is not predefined in the top configuration "pipping" will not work.

Note: the format is one variable per line.

Note: Button Name is the associated label name, chosen by the user, that the button will display in the Email Content section.

Data Pipping: Allows data from the REDCap form(s) to be piped into the email messages. Project variables must be mapped to labels to ensure proper pipping. Enter one mapping per line. Format must be [variable], Button Name.

Survey Links: Allows enabled REDCap surveys to be inserted into email messages.

The easy way to add a survey is to select the button. Once in this window, define the instrument/survey and create a label for the content button. You can also directly type in the data as long as you follow this format: *[__SURVEYLINK_form_name]*

Note: Survey Links have to be enabled as Save and Return in Survey Setting to use this option, otherwise it will show an error message. It is recommended to enable Save and Return before adding it on the configuration otherwise it won't recognize it until the page is refreshed.

• Email Errors

Email Errors is where specific emails recipients are designated in case an error is generated.

Failed Email Alerts: Type in the specific email address that need to see any generated email error.

Add New Email

 When clicking on the *Add New Email Button* a window will open to create a new email alert.

There are three sections:

1. Email Triggers
2. Email Content
3. Email Attachments

• Email Triggers

Here conditions are set to send email.

REDCap Instrument: Drop down to select the instrument/form that will activate the email alert when this one is completed.

Email Condition (REDCap logic): Enables the option to add logic for a specific email.

*For example: [name_var] = 1 will only send the alert when the variable equals 1.*

You can configure this so that only one or both of the triggers need to be met.

Send emails for any Form status?: On activating this option, the email will be sent EVERY TIME the form has been saved. If this option is not checked, it will only be sent when the form is completed.

• Email Content

Email content is where information pertinent to the email is added. This is also where the buttons from the email alert configuration will appear.

Data Pipping (Email Addresses)

Data Pipping (Email Content)

Survey Links (Email Content)
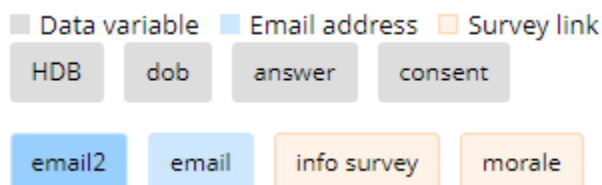
An Example on how the buttons will appear

Email From: The sender address and sender name. By default will appear with the value from Control Center configuration if any has been added.
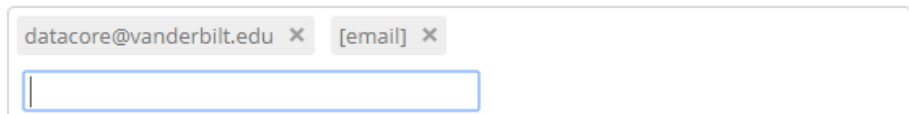
Note: The sender name can be left blank but not the address.

Email To: The email address of the receiver. If variables have been added to data pipping from the Email Addresses configuration, blue buttons will appear, meaning we can add it in there as well

Note: The variables can also be typed but will ONLY work if they have been defined the above configuration.

Note: Predefined Emails and REDCap variables can also be added in same alert.

Email To: [datacore@vanderbilt.edu ✕] [[email] ✕]

Email CC: The email address/es to send as a Carbon Copy to the receiver. See **Email To** for functionality.

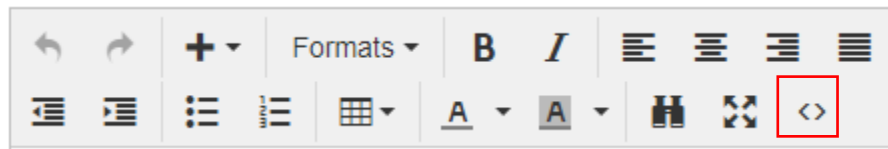**Email BCC:** The email address/es to send as a Blin Carbon Copy to the receiver. See **Email To** for functionality.

Subject: The subject of the email. Data variables buttons can be used in this section.
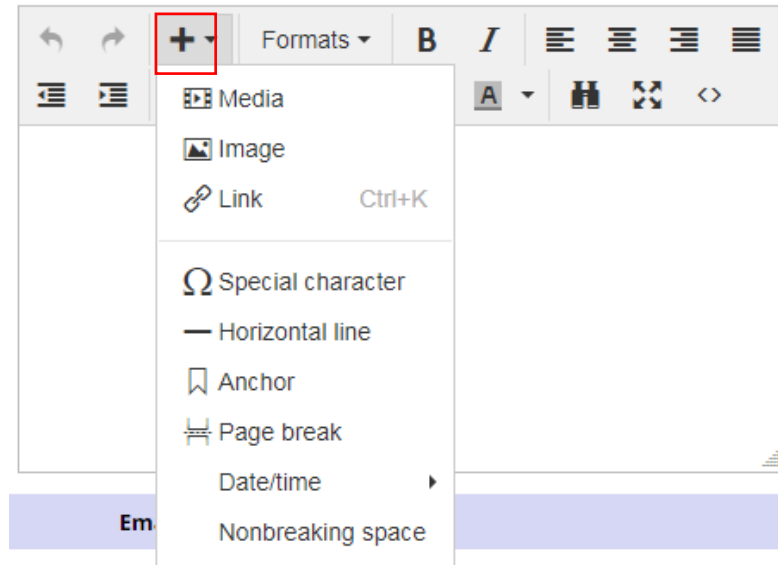
Subject: [Is [answer] correct?]

Message: The body of the email.

- To add HTML code click on the '<>' button

- To add images click on the '+' button

- ## Email Attachments

Email Attachments is where files can be added to the email and the resend option can be activated.

REDCap file variables: If there are one or more variables in REDCap that are files, by adding the REDCap name in this field, they will be sent as attachments in the email.

Email Attachment (1-5): Up to 5 files can be attached from the user's computer.

Resend Emails on Form Re-Save? On activating this option, the email will be sent EVERY TIME the form has been completed. If this option is not checked, it will only be sent the first time the conditions are met.

Deleted Alerts(admins only)

Admins will now see a new checkbox in the alerts table: ☑ Deleted (user)

When checked admins will be able to see all alerts deleted by any user.

Add New Email							☑ Deleted (user) ☑ Active only
Show 50 ▼ entries						Search:	
Form	**REDCap logic**	**Send emails for any Form status?**	**Email Addresses**	**Message**	**Resend Emails on Form Re-save?**	**Attachments**	**Actions**
Alert #1 my_first_instrument_2 ***Email was ACTIVE when deleted***		No	*Email To* eva@eva.com	From: noreply@vanderbilt.vumc,"" Test 1 Preview Message	No	0 files	Re-Enable Permanently Delete

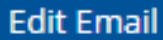Showing 1 to 1 of 1 entries (filtered from 4 total entries)   Previous 1 Next

Admins can choose to permanently delete the alert or re-enable it to use again.

Alert Buttons

There are four buttons that each alert will have.

Edit Email: Opens the editor mode of the alert to edit any changes.

Deactivate Alert: when clicking on it, it will ask to activate or deactivate an alert. If the alert is deactivated, it will disappear from the table. To see all the non-active alert simply uncheck **the Active only** checkbox at the top of the table.

Duplicate: duplicate will copy all fields of an alert to create a new one with the same settings.
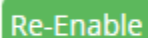
Note: Attachments will not be copied.

Delete: will delete an alert from the system.

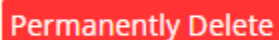## • Deleted status buttons (only admins)

These buttons will appear when an admin clicks on the *Deleted (user)* checkbox:
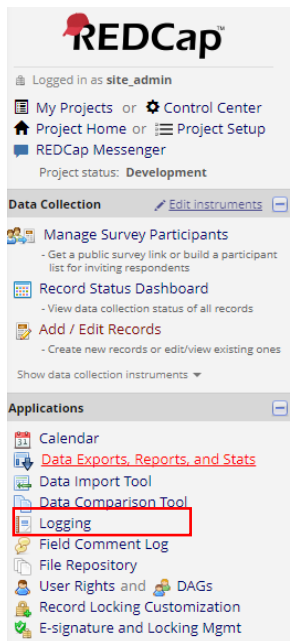
Re-Enable: will enable an alert that has been deleted by the user.

Note: The alert will become enabled with its previous status. If it was deactivated, it will keep that status.

Permanently Delete: will permanently delete an alert. The logging will show all of the alert information when deleted, in case it needs to be recreated.

Note: Alerts will be re-numbered.

Logging

In the left menu, on REDCap, there is the Logging option. This option allows the user to check information related to sent alerts.

For each alert sent there will be two logs:

Email Sent To – Alert #: lists which emails addresses have received the email

Email Sent– Alert #: Shows the Subject and Message of the alert.

Time / Date	Username	Action	List of Data Changes OR Fields Exported
10/30/2017 2:08pm	site_admin	Email Sent To - Alert 1 Record 15	eva.bascompte.moragas@vumc.org;eva@vumc.org;
10/30/2017 2:08pm	site_admin	Email Sent - Alert 1 Record 15	[Subject]: TEST, [Message]: this is a test

For each alert deleted, **by admins,** there will be two logs:

Deleted Alert # To: lists who should receive the email.

Deleted Alert #: Shows the Subject and Message of the alert.

01/15/2018 3:24pm	site_admin	Deleted Alert #1 To	eva@eva.com
01/15/2018 3:24pm	site_admin	Deleted Alert #1	[Subject]: Test 2, [Message]: Test 2

Note: Email Triggers, Attachments, and Resend selection will not show in logging.