



SSF Tools: Email Template Editor User Guide

Document Revision History

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Introduction

The Email Template Editor provides an administrative UI for editing IdentityIQ email templates. Plain text and simple HTML templates are supported. A WYSIWYG interface is provided for HTML templates.

Installation

The Email Template Editor ships with the SSD but is not deployed by default as part of the build. Deployment can be switched on or off by use of the “deployEmailTemplateEditor” property in the build.properties file. Set this to “true” to enable deployment, or “false” to disable. Alternatively, the SSD Deployer tool can be used to enable or disable deployment (see the SSD Deployer User Guide).

Components

The tool includes a Workflow which is used to present a form to the user and create or update email templates, and a QuickLink to launch the workflow. In addition there are objects that control access to the QuickLink: these are a Workgroups, a Dynamic Scope and a modification to the SystemConfiguration object. The following files are imported as part of deployment:

- config/SSF_Tools/EmailTemplateEditor/Source/Configuration/EmailTemplateEditor_SystemConfigurationMerge.xml
- config/SSF_Tools/EmailTemplateEditor/Source/DynamicScope/EmailTemplateEditor_EmailTemplateAdmins.xml
- config/SSF_Tools/EmailTemplateEditor/Source/QuickLink/EmailTemplateEditor_EditEmailTemplateQL.xml
- config/SSF_Tools/EmailTemplateEditor/Source/Workflow/EmailTemplateEditor_EditEmailTemplates.xml
- config/SSF_Tools/EmailTemplateEditor/Source/Workgroup/EmailTemplateEditor_EmailTemplateAdmins.xml

There is also an Ant script that fixes an issue with color controls for fonts and text highlighting:

- scripts/build.templateeditor.fixcolors.xml

This appends the ext-patches.js file (in the scripts folder in the extracted build) with a few lines to fix the issue, overriding the Ext.picker.Color control. If you wish to do this part manually (without running the build), add the following lines to the ext-patches.js file:

```
Ext.override(Ext.picker.Color, {
  renderTpl: [
    '<tpl for="colors">',
    '<a href="#" class="color-{.}" hidefocus="on">',
    '<em><span style="background: #\{.}" unselectable="on">&#160;</span></em>',
    '</a>',
    '</tpl>"]
  });
```

During deployment, a Quick Link Category called “Admin” is added to the SystemConfiguration. A workgroup called “Email Template Admins” is created, and a DynamicScope is used to limit access to an “Edit Email Templates” QuickLink based on membership of that workgroup.

How to Use the Email Template Editor

In order to use the Email Template Editor a user must be a member of the “Email Template Admins” workgroup, or have the SystemAdministrator capability. This provides a QuickLink category labelled “Administration” in the UI, and a QuickLink under this called “Edit Email Template”.

On clicking the QuickLink the user will be presented with a “Select Email Template” form. A dropdown labelled “Template” allows the user to create a new email template or select an existing one for editing. Clicking “Next” brings up the form that is used to enter or edit the template details.

The field has a “Template Type” selector to switch between editing the template as plain text or HTML. The screenshot below shows the form in plain text mode:

Edit Template

Edit Template

Template Name*

Subject*

Template Type

☐ HTML
 ☒ Plain Text

Message Body

A new access certification report has been assigned to you: \$workItemName.

Login and view your work item inbox to complete this access certification report.

Template Description

Variables available in this template

\$workItemName: The description property (also the name property) of the certification WorkItem.

\$workItem: The WorkItem object for the certification.

\$certification: The Certification object.

\$requesterName: The display name of the Identity that requested the certification.

\$ownerName: The display name of the Identity that owns the certification.

In HTML mode the form looks like this:

[Edit Template](#)

Edit Template

Template Name*

Certification - html

Subject*

New access certification: \$workItemName

Template Type

☒ HTML ☐ Plain Text

Message Body

Tahoma

B I U A⁻ A⁺ Background Color Font Color Bulleted List Numbered List Indented List Insert Image

Dear \$ownerName,

Action required - new access review

A new access certification report has been assigned to you: \$workItemName.

View the access review [here](#).

Complete the access review, approving or rejecting access to resources for each user as appropriate.

Sign off the review when complete.

Please note: Action must be taken within 4 weeks of receipt of this email to prevent users losing access.

For further assistance please visit our help pages [here](#) or call the Identity and Access Management team on extension 54321.

Kind regards,

The Identity and Access Management team

Numbered List

Bullet List

Source Edit

Template Description

Email template for notifying work item owners of new certifications.

Variables available in this template

\$workItemName: The description property (also the name property) of the certification WorkItem.
\$workItem: The WorkItem object for the certification.
\$certification: The Certification object.
\$requesterName: The display name of the Identity that requested the certification.
\$ownerName: The display name of the Identity that owns the certification.

Save Cancel

The form has the following fields:

Field name	Description
Template Name	Name of the Email Template object. Read-only when editing an existing template.
Subject	Subject line of the email
Template Type	Choose between HTML and Plain Text
Message Body	Email message content. For a plain text email this will not have any formatting but may include variables allowed by the template. For HTML it will include an HTML editor control that allows font selection, formatting of text, insertion of hyperlinks, numbered and bulleted lists and text alignment and editing the HTML source. The HTML control also allows pasting of formatted text, tables etc.
Variables available in this template	This read-only area will only be displayed if editing an existing template that has its variables defined in a signature. It presents the names and descriptions of each allowed variable for convenience.

When editing an existing template, the type of template will be detected and the Template Type selector will be set appropriately. For an existing template the Template Type can be toggled between Plain Text and HTML to change the type of template; however, if changing from HTML to Plain Text the HTML tags will appear in the Message Body field and will need to be removed. If changing the Template Type after editing the Message Body, the changes made will not be reflected in the Message Body for the new type.

When you have completed editing the fields, save the email template and it will be ready for use.

Limitations

The Email Template Editor has the following limitations:

- When editing existing HTML templates it is advisable to make a copy of the template before editing as the editor may remove more complex HTML or modify other elements.
- Known product issues in GA versions of IdentityIQ 7.0 and 7.1 caused problems with line feeds being removed when displaying an existing template. Please ensure you have minimum patch levels of 7.0p6 or 7.1p1 to avoid this issue.
- The tool uses old-style Ext-JS forms, not IdentityIQ 7.x responsive forms. It is possible that future versions of IdentityIQ may remove support for these, in which case the tool will no longer work.