

ADMIN GUIDE: MESSAGE TEMPLATES v1.1

Message Templates Overview

Message Templates are automated messages and notifications that are sent to DCI users based on specific events or triggers in DCI. Message Templates can only be edited by a Super User.

Message Templates can be found by clicking on “Settings” and then “Message Templates.” Find a message template type by scrolling through the list or using the filter criteria boxes at the top of the screen.

Message Templates are split into two categories:

1. **Messages:** Messages are sent to the user’s inbox in the DCI messaging module. Because messages are housed completely within DCI, they contain more detailed information than notifications. Messages will include hyperlinks to specific objects in DCI, such as a profile or a punch entry. When active, all message templates will send a message.
2. **Notifications:** Notifications are sent to a user’s email address and/or as a text message. Because notifications are sent outside of DCI, they contain limited information in order to protect confidentiality. The user must log into DCI to view the details. In order for a user to receive a text message notification, they must verify their mobile phone number under employee settings on their personal profile.

To edit a Message Template:

1. Click on the Message Template.
2. Click Actions>Edit Message Template.

Every Message Template contains the following:

- **Message Template Type:** This is the event in DCI that triggers the message to be sent.
- **Message Template Subject:** This will appear in the subject line for the message.
- **Message Template Body:** This is the body of the message. Message Templates use macros to display dynamic information in the body of the message. Text wrapped in < > will display the dynamic data for that macro. For example, <Entry ID> will display the entry ID as a hyperlink. Click the desired macro(s) to add to the message body. The macro will appear in the message body wherever your cursor is located when you click the macro.
- **Notification Template Subject:** This will appear in the subject line for the notification.
- **Notification Template Body:** This is the body of the notification.
- **Notification Type:** This indicates where you want the notification sent:
 - None (no notification is sent)
 - Email (sent only to the recipient’s email address)
 - SMS (sent only as a text message to the recipient)
 - All (sent as both an email and a text message)
- **Message Priority:** This indicates the priority of the message sent within DCI.
- **Message Recipients:**

- Creator: The creator of the object that triggered the message. For example, the creator of the punch entry for the “Punch Created” message template.
- Supervisor: Users with the Supervisor Role over the Cost Center in which the event occurred.
- Manual: Manually enter in the names of the DCI users.
 - If Manual is selected, Recipient Macros will appear on the screen. This allows the user to select multiple recipient groups. Click the desired macro(s) to add to the recipient group.
- Employer: Users with the Employer Role over the Cost Center in which the event occurred.
- Billing: Anyone with the Billing Role.
- Payroll: Anyone with the Payroll Team Role.
- Template Status:
 - Active
 - Inactive

Message Template Types

The following is a list of all events that can trigger a message and/or notification in DCI:

- Punch Created
- Punch Updated
- Compensate Punch Entry
- Punch Verified
- Client Sign-Off Override
- Punch Approved
- Punch Cancelled
- Punch Rejected
- User Locked Out
- Reset Password
- Change Password
- User Unlocked
- Processed (for payroll and billing batches)
- Approved (for payroll and billing batches)
- Pay Rate Refreshed (for payroll batches)
- Client Sign-Off
- Sign-Off Rejected
- Reconciliation Failed (for payroll and billing batches)
- Bill Rate Refreshed (for billing batches)
- Pin Changed
- Pin Added
- Authorization Related Scrub Violation
- Approved Authorization Related Scrub Violation
- Exceed Daily Limit (authorization)
- Approved Excess of Daily Limit (authorization)
- Email Changed
- Profile Certification Created
- Profile Certification Edited

- Profile Certification Expired
- Account Inactive
- Certification reached initial reminder deadline
- Certification reached reminder deadline frequency
- Schedule Published
- Day Program Out of Ratio
- Shift Claimed Employee
- Scheduling Notify Failure to Punch
- Schedule Entry Rejected
- Profile Certification Rejected
- Availability Template reached initial reminder deadline
- Availability Template reached reminder deadline frequency
- Punch Auto Approved
- Punch Auto Approve Failed
- Grace Period Expired
- Training System Student Registration Failure
- Scrub Validation Succeeded
- Scrub Validation Failed
- Scrub Executed
- Net of Pay Reconciliation Process Completed
- Secure Token Validation Success (FOB)
- Secure Token Validation Failure (FOB)
- Client Phone Line Validation Success
- Authorization Management System Authentication Failure
- Client Phone Line Validation Failure
- EVV Verification Failed
- Employee Net Negative Hours (payroll)
- Exception Batch Created
- OT Check Insufficient Balance
- Import Completed
- Import Failed
- EVV Facial Verification Failed
- Critical Service Gap
- Unauthorized Access Tolerance Exceeded
- Unscheduled Punch
- Scheduling Notify Upcoming Shift Reminder
- Geofence Rejection
- Employee Self Registration
- Refresh Billable Amount Process Complete
- EVV Location Imported