

Message Templates - Admin Guide

Description: In this topic, the user will learn about message templates. 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 are split into two categories, messages and notifications.

- 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.
- 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 to protect confidentiality. The user must log into DCI to view the details. For a user to receive a text message notification, they must verify their mobile phone number under employee settings on their profile.

*Please note: There are many different Message Template types. To view the complete list, follow the View Message Templates steps below.

Role Required: Super User

Permission Required: N/A

View Message Templates

1. Log in to DCI with personal profile
2. Click **Settings** on the main menu
3. Click **Message Templates** on the submenu
4. Scroll through the list (click the **Load More** button at the bottom until all records have loaded) or use the filters to locate specific message templates
5. Select a message template to view the details by clicking anywhere on the row

Edit a Message Template

1. Log in to DCI with personal profile
2. Click **Settings** on the main menu
3. Click **Message Templates** on the submenu
4. Scroll through the list (click the **Load More** button at the bottom until all records have loaded) or use the filters to locate a specific message template to edit
5. Select a message template by clicking anywhere on the row
6. Click **Actions**
7. Select **Edit Message Template** from the drop-down menu
8. Edit the template - part 1, Messages
 - a. Message Template Type - The event in DCI that triggers the message to be sent. This field is grayed out and cannot be edited.
 - b. Message Template Subject - Subject text will appear in the subject line of the message.
 - c. Message Template Body - The body of the message. Enter the text that users will see when they open the message.
 - d. Macros - Macros display dynamic information in the body of the message. Text wrapped in < > will display the dynamic data for that macro.
 - i. Place the cursor in the message body where the macro should be inserted. Click the desired macro(s) to add.
 1. Example: To add a name, enter a greeting then click on the <Profile Fullname> macro. The body text box would display the following: Hello <Profile Fullname>
9. Edit the template - part 2, Notifications
 - a. Notification Template Subject - Subject text will appear in the subject line of the notification.
 - b. Notification Template Body - The body of the notification. Text that users will see when they open the notification.
 - c. Macros - Notifications have only one macro to select. This is the Message Details Link macro, which users will click to log in to DCI and view.
 - i. Place the cursor in the message body where the macro should be inserted. Click the desired macro to add.
10. Notification Type - Select from the drop-down to choose how the user will receive the notification
 - a. None - No notification is sent
 - b. Email - Sends an email to the address on the user profile
 - c. SMS - Sends a text message to the number on the user profile
 - i. Please note: To receive SMS text notifications, the user must verify their mobile number in their profile settings.
 - d. All - Sends the notification via email and SMS text
11. Message Priority - Select low, normal, or high from the drop-down
 - a. High priority will display a red banner on the user's dashboard
12. Message Recipients - Select from the drop-down to determine the users who will receive the message or notification. The options are:
 - a. All - Sends to all message recipient types except for manual
 - b. Creator - Sends to the creator of the object that triggered the message. For example, the creator of the punch entry for the Punch Created message template.
 - c. Supervisor - Sends to users with the supervisor role for the cost center in which the event occurred

d. Manual - Manually enter the names of the DCI users. Enter a specific user(s) or use the macros that open when Manual is selected.

i. Click the desired macro(s) to add to the recipient group

ii. Macro options include the following, all of which must be in the same cost center to receive the notification or message:

13. Template Status - Select Active or Inactive from the drop-down

14. Click **Save** and **Yes** to confirm

Preferred Language Message Templates

DCI can send messages and notifications in the user's preferred language. To use this feature, an instance-level setting must be enabled. Please contact DCI to learn more. The languages currently supported by DCI are:

- English
- Spanish
- Vietnamese
- Russian
- Mandarin
- Somali
- Arabic

Translate a Message Template to a Preferred Language

To translate a message template, follow the steps above to edit, clicking the blue **Translate** button for each language. The following fields can be translated:

- Message Template Subject
- Message Template Body
- Notification Template Subject
- Notification Template Body

Related articles

- [Group Service - Supervisor Guide](#)
- [Message Templates - Quick Reference](#)
- [November 2023 Release Notes](#)
- [Who can I send a message to in the messaging module?](#)
- [Messaging Module - Navigation - Mobile App](#)