



## Engage Learners with Automated & Customized Emails

Send automated reminders, updates, information, news and more to drive learner engagement.

### ABSTRACT

Draw your learners in with event-triggered email notifications and AI based recommendations. Keep them informed, motivated and on-task with Adobe Captivate Prime's automated and customizable templates.

Adobe Captivate Prime Product Management  
A 2021 Customer Guide



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From the time a user is added and registered in the LMS there are a variety of actions they are subject to or undertake, from being assigned roles, to being enrolled in Trainings, to being waitlisted, to being sent reminders, to being sent recommendations for trainings they may like.

If you are an enterprise with a large number of employees, who may at any time be enrolled in a variety of training programs, at different stages of completion, it becomes hard to keep up with the updates of the “who, where, when, and what” in an organized and efficient manner when it comes to their training progress.

The provision of a variety of email notification templates is a very useful tool for Administrators of an LMS, enabling them to decide when an email should be sent and to whom, and to customize it as they see fit. Additionally, learners also benefit from a wide range of email notifications, keeping them posted on their onboarding status, enrollments in Trainings, approaching deadlines, and even how their colleagues are faring on the [leaderboard](#).

## Automate and customize email notifications with Adobe Captivate Prime

The Adobe Captivate Prime LMS comes with a large assortment of nearly 60 email templates that serve specific user requirements. The templates can be customized for content and look and feel. The body of the email does support HTML tags should you need to send links. As Admin you can select which emails you wish to enable and those you don't. You can even add some users to a DND (“Do Not Disturb”) list so that they never receive system emails. (This could be pertinent, for example, to employees away on a few months leave who do not require ongoing training or reminders for the same.)

Setting up your emails for content, look and feel, and being able to automate the sending of these emails saves Admins much time and energy. Automation also decreases the likelihood of errors, for example if an Admin forgets to send out an email to a learner notifying them of an opening in a Training, resulting in delayed training completion for said employee.

## Enable email notifications

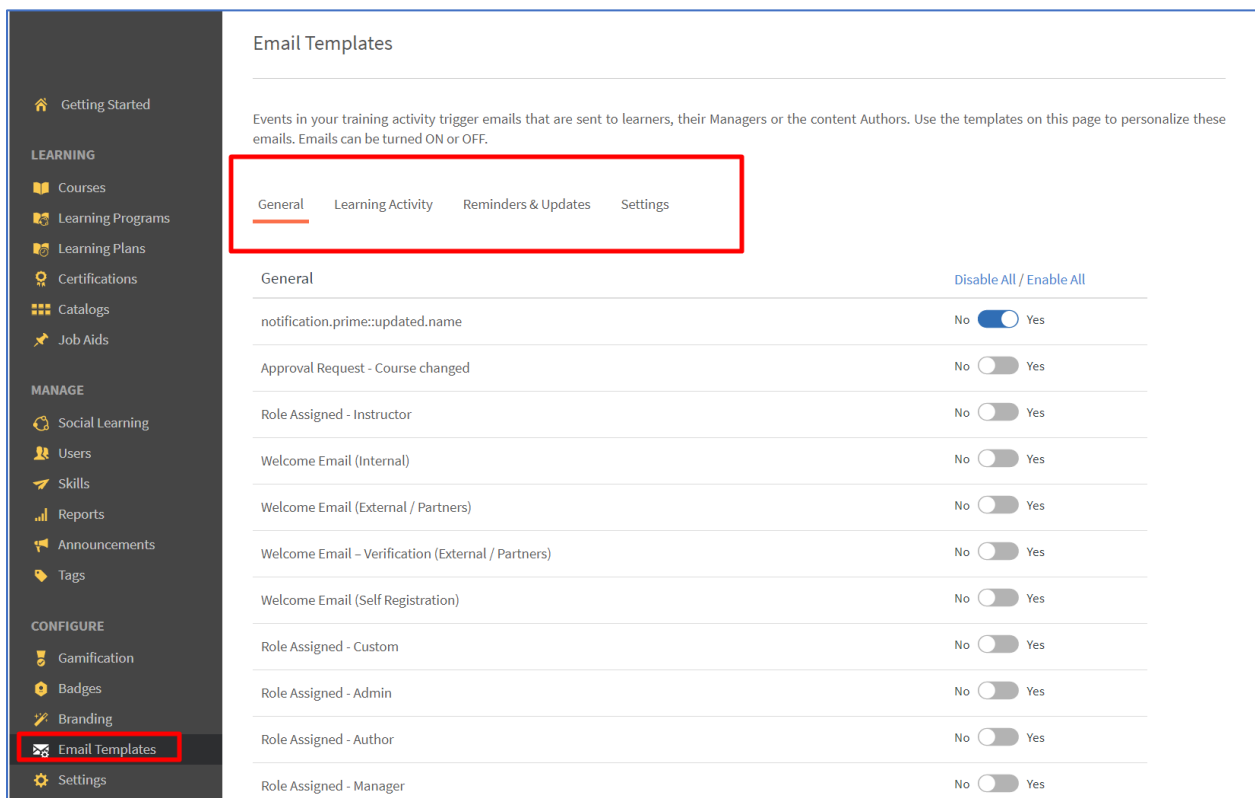
There are a several different occasions on which users in the LMS receive an email from the system. There are learner-specific emails that, for instance, remind learners to take a certification course before a certain date. There are manager centric emails that you send when, for instance, above mentioned learner fails to take the

certification course in time. All these events can be configured to automatically trigger emails in the LMS. All you have to do is select which ones you want to enable.

As Admin, at the account level settings, you can choose to enable or disable all emails according to your organizational requirements. If yours is a small to medium sized organization with limited Trainings, then you may want to keep all the email notifications on and perhaps for certain Trainings, turn them off if necessary, at the Training level

If yours is a large organization with thousands of employees and hundreds of Trainings, you may not want to compromise your system or overload your employees with several emails all the time, and so you may decide to turn off/disable all emails at the account level and only enable email notifications, e.g. for special, timebound Certifications at the Training level, that you deem most important.

Note: Even if you enable/disable all emails at the account level, you can still turn them on/off at the Training level, for individual Trainings (go to the Training→Email Templates) and enable/disable.



**Email Templates**

Events in your training activity trigger emails that are sent to learners, their Managers or the content Authors. Use the templates on this page to personalize these emails. Emails can be turned ON or OFF.

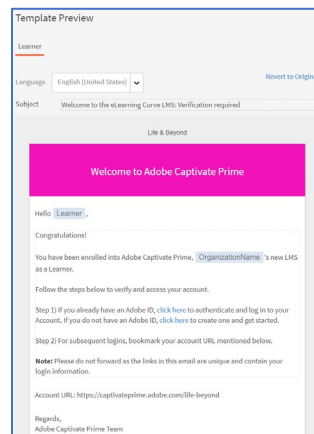
**General**   Learning Activity   Reminders & Updates   Settings

**General** Disable All / Enable All

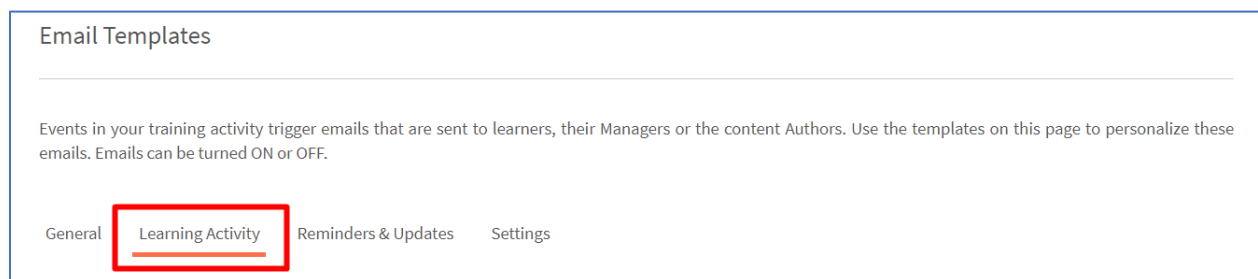
Event	No	Yes
notification.prime::updated.name	No <input checked="" type="checkbox"/>	Yes
Approval Request - Course changed	No <input type="checkbox"/>	Yes
Role Assigned - Instructor	No <input type="checkbox"/>	Yes
Welcome Email (Internal)	No <input type="checkbox"/>	Yes
Welcome Email (External / Partners)	No <input type="checkbox"/>	Yes
Welcome Email – Verification (External / Partners)	No <input type="checkbox"/>	Yes
Welcome Email (Self Registration)	No <input type="checkbox"/>	Yes
Role Assigned - Custom	No <input type="checkbox"/>	Yes
Role Assigned - Admin	No <input type="checkbox"/>	Yes
Role Assigned - Author	No <input type="checkbox"/>	Yes
Role Assigned - Manager	No <input type="checkbox"/>	Yes

## Administrative related emails

As Admin, navigate to the “General” tab under Email Templates. These are the more generic emails you can set up to be triggered by events in the LMS such as when a user joins, is assigned a role, or when they need to change their password, or if an external profile is created, etc. You can change the content of each template to suit your requirements, and you can choose which ones you want to enable/disable.



## Training related emails



These emails are triggered by events that are wholly related to Trainings, e.g. when a learner self-enrolls in a Course the system sends them a notification to confirm the enrollment. There are also emails here that can be enabled so that managers are notified on the occurrence of learner behaviors e.g. a learner rejects a manager nominated enrollment.

Automated email notification with regard to enrollments and completions come in handy especially, for example, when you set up [Learning Plans](#) for user groups and learners are automatically enrolled in a new Training on the completion of a previous Training.

## Reminders and Updates



Anytime there is a need to update or remind a learner to start/complete a Training, there is an email template available towards this end. Whether you need to let them know that they have a deadline looming, or that they might like to visit some course notes they took, you just have to personalize and enable these email templates.

### Email Templates

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General   Learning Activity   **Reminders & Updates**   Settings

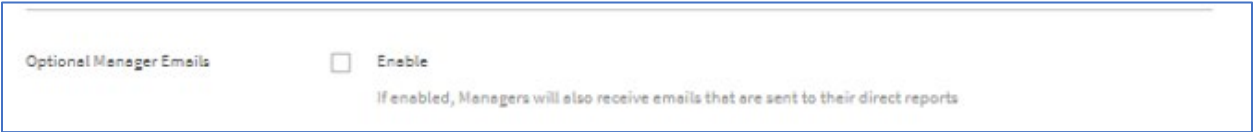
Reminders & Updates	<a href="#">Disable All / Enable All</a>
Session Details Updated (Flexible Learning Program)	No <input checked="" type="checkbox"/> Yes
Sessions Details For Other Virtual Classroom	No <input checked="" type="checkbox"/> Yes
Sessions Details For Classroom	No <input checked="" type="checkbox"/> Yes
Sessions Details For Adobe Connect	No <input checked="" type="checkbox"/> Yes
Session Details Updated	No <input checked="" type="checkbox"/> Yes
Reminder for upcoming Session	No <input checked="" type="checkbox"/> Yes
Report Dashboard Shared	No <input checked="" type="checkbox"/> Yes
Course Completion	No <input checked="" type="checkbox"/> Yes
Reminder for Course completion - Before deadline	No <input checked="" type="checkbox"/> Yes

## Keep managers informed



Just like you notify learners about enrollments, completions and other learning activity related events, you can also choose to inform their managers about the same. The system default is set so that managers do not receive such notifications. If you have large teams, it would be an information overload for managers to be notified, e.g. every time someone in their team enrolls in or completes a Training.

However, should you want your managers to receive these notifications, navigate to the “Settings” tab and scroll down to “Optional Manager Emails”. Check the box to enable managers to receive notifications.

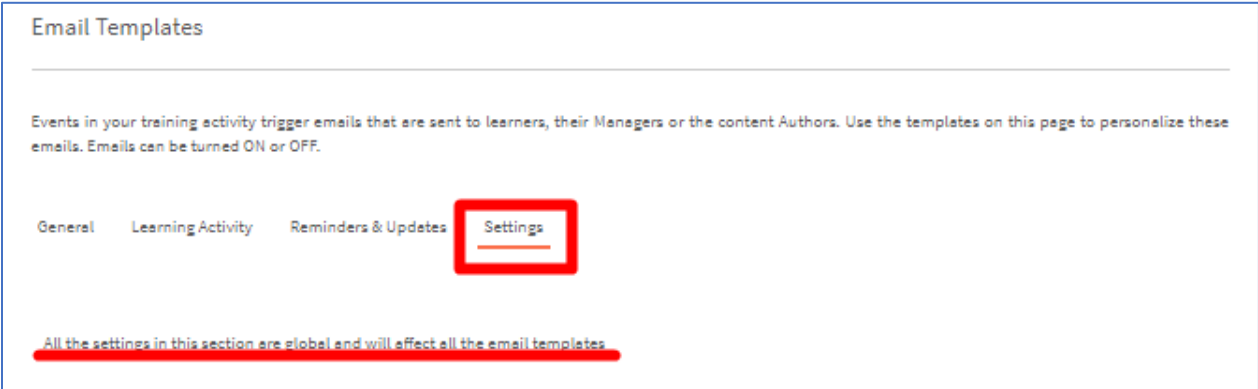


Note: Even if you do not enable this setting, and managers in your account are not set up to receive regular notifications, *they will still receive escalation email notifications* when learners in their team fail to meet Training Deadlines. [[These escalation emails can be set up at the Course/Learning Program Instance level, at the time of creating the Training and setting the deadline.](#)]

## Customize your emails

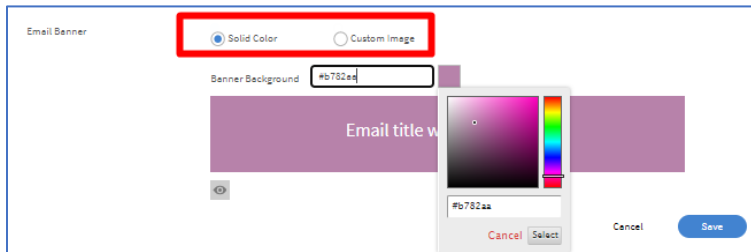
The email notifications that are sent to users in the LMS have an Outlook style layout. Every email has a template with suggested content which you can customize to suit your preferences. This is particularly with regard to the “General”, “Learning Activity”, and “Reminders & Updates” templates.

Navigate to the “Settings” tab on the Email Templates page. Here you will find all the customizable options for your [email templates](#).

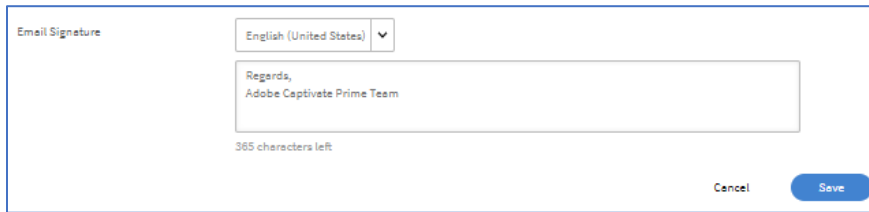


As noted in the screenshot above, all the settings in this section are global and will affect all email templates. Use this section to customize aspects of your emails such as:

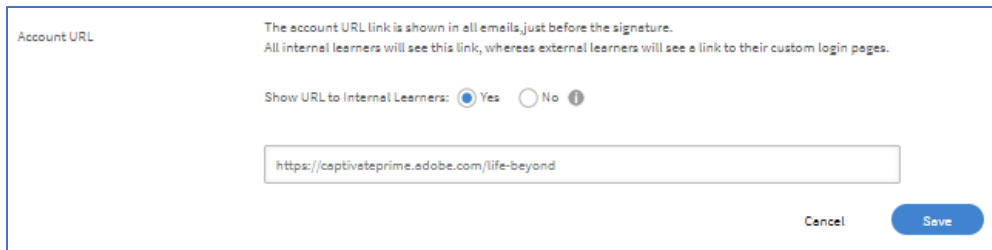
- the email banner



- your signature



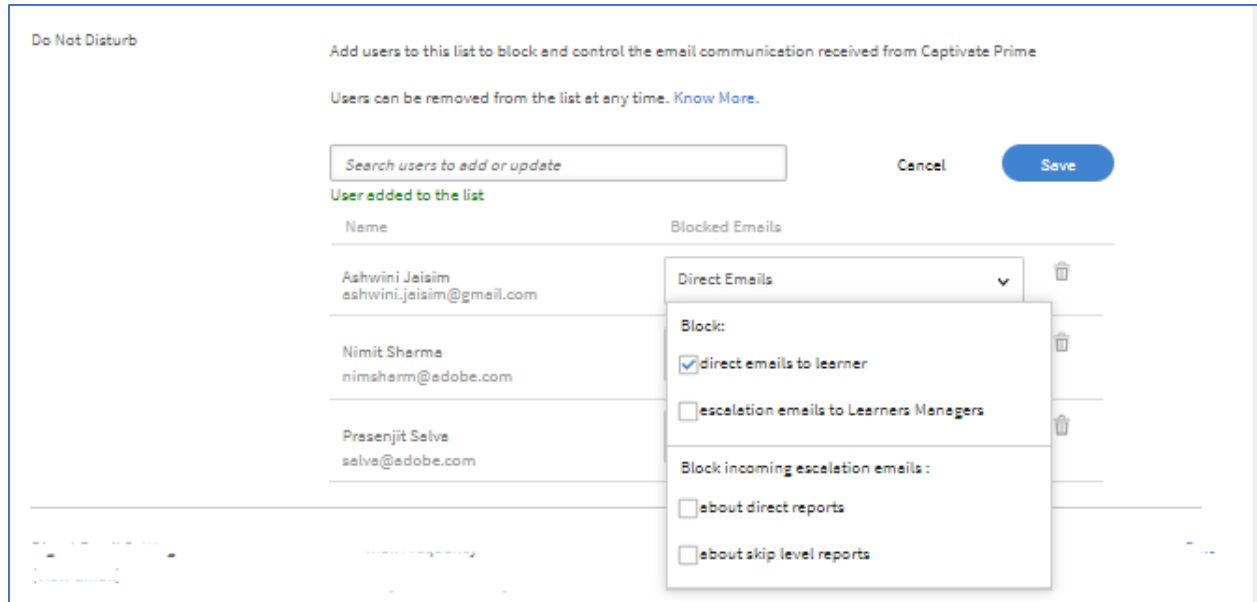
- the account URL



Note: If you want to change details of the sender name and address, you must contact support at [captivateprimesupport@adobe.com](mailto:captivateprimesupport@adobe.com).

If you want your learners' managers to be notified every time your learners receive emails, you can enable that here, as mentioned above in the paragraph, '[Keep managers informed](#)'. If there are users in the system who, for any reason, should not receive email notifications, you can edit this list here and add individual users to this "Do Not Disturb" list.





When you add a user to the DND list you can further filter which emails to block:

- ✓ Direct emails to the learner: ones sent from the LMS with updates/info, etc. You could use this, for example, when a learner is away on maternity/paternity leave or a sabbatical.
- ✓ Escalation emails to the learner's manager: for some reason should you not want a learner's manager to receive escalation mails, you can block those here. E.g. the manager is away and does not want to receive such emails.
- ✓ Block incoming escalation reports about direct reports: this applies to managers who may not want/need to receive emails about escalations regarding team members' non-completion statuses. For example, the CEO of a company may rarely need to receive escalation emails regarding his direct team.
- ✓ Block incoming escalation emails about skip level reports: again, the said CEO may not want to receive dozens of emails about his direct team's teams which may be hundreds of people.



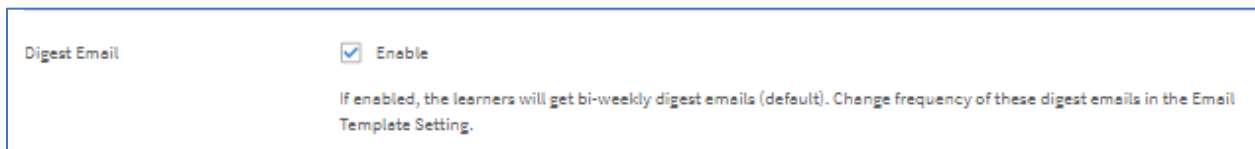
## Enable and use Email Digests

"Email Digests" lets you email a compilation of training related information to your learners, including:

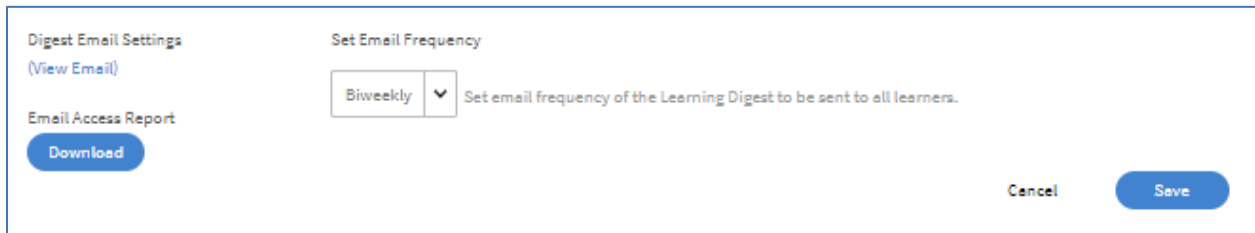


- A summary of training activity in the LMS that gives them information about how many trainings there are, how many co-workers have been upskilling themselves, how many hours of training they have clocked and the average time spent training in a day.
- [AI based training recommendations](#) (considers peer learning, trending industry and organizational Trainings, roles, and personal learning history).
- The organization leaderboard which shows the learner how many points they have versus other learners.
- Latest posts on the Social Learning feed.

To enable this feature, as Admin navigate to Settings → General and scroll down to “Digest Email” where you must check the box “Enable”. The default frequency that you can send these email digests is bi-weekly (every two weeks).



Then navigate to Email Templates → Settings tab and scroll down to Digest Email Settings to make more changes, and view a sample email digest.



## Email Access Report

This report gives insight into email analytics for the email digests as detailed below:

1	Email Cycle	Sent	Delivered	Opened	Clicked
2	6/24/2020 12:51	74	1	1	2
3	6/26/2020 9:23	75	1	1	1
4	6/27/2020 4:00	73	0	0	0
5	6/30/2020 7:20	75	1	1	0
6	6/30/2020 7:39	75	1	1	3
7	6/30/2020 8:22	75	1	1	2
8	6/30/2020 10:36	77	2	0	0



- Email Cycle: this is the date and time stamp of the email.
- Sent: This is the number of recipients the email was sent to.
- Delivered: This is the number of recipients to whom the email was actually delivered.
- Opened: Of the number of delivered emails, this is the number of emails actually opened.
- Clicked: This reflects the unique click through rate which enumerates the number of links/recommended trainings that an individual actually clicked on. To stay true to the count, even if a particular link is clicked on several times, the count remains "1" for that link.

Click on the "Download" button to get a comprehensive report on the email digests that the LMS has sent to your learners.

## Conclusion

Email notifications in the Captivate Prime LMS are a quick and dependable way to get information to your employees. As described above and as seen in the Admin UI, there are a wide variety of templates available that cover the entire gamut of generic and Training related communications. As Admin you can personalize templates and control the emails that get sent out and to whom. Additionally, the Email Digest feature gives you a whole new way to engage and motivate your learners. Adobe Captivate Prime uses cutting-edge AI technology to curate Trainings to suit every individual learner, helping you keep them focused and informed.