

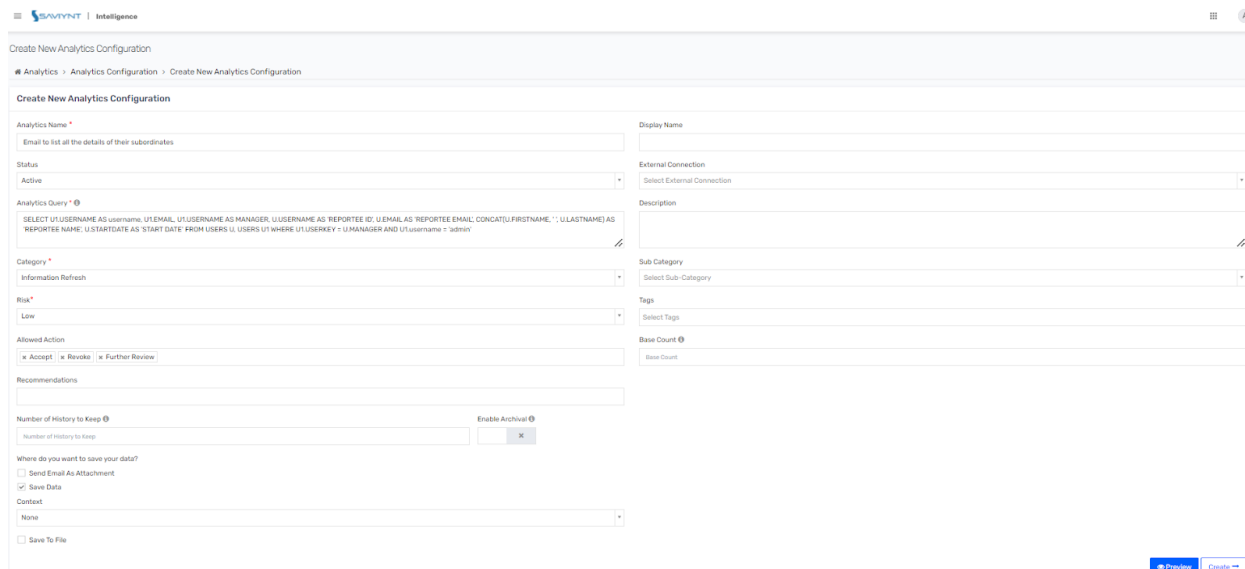
How to notify Saviynt users of report data via email

Step 1) Create A Control

1. Select **Intelligence > Analytics Configuration List**.
2. Click **Create New Analytics**.
3. Select **Using SQL Query**.
4. Enter the SQL Query for expiring passwords and the remaining fields to fill as below: -

```
SELECT U1.USERNAME AS username, U1.EMAIL, U1.USERNAME AS MANAGER,
U.USERNAME AS 'REPORTEE ID', U.EMAIL AS 'REPORTEE EMAIL',
CONCAT(U.FIRSTNAME, ' ', U.LASTNAME) AS 'REPORTEE NAME',
U.STARTDATE AS 'START DATE' FROM USERS U, USERS U1 WHERE
U1.USERKEY = U.MANAGER
```

Note: The username column is important as it will derive the user Email parameter in the Email template. Upon creation of the control each username having a valid Email id in their profile will receive a mail mentioning their reportee details as long as you set up the Email template as specified in below sections.



5. Select 'Save Data' Checkbox with 'None' Context and then Select **Create**.
6. When you click **Create** after entering all the required parameter details, an additional pop-up screen appears. Depending on the SQL query, you can select the columns to be displayed or to be filtered. Click Submit.
7. If you run the control using 'Run Now,' it will disburse the emails. If you would like to schedule, Go to Admin -> Job Control Panel -> Add New Job

8. Fill in the information as shown below and provide a job name as you desire

×

Create New Trigger

Job Name* <input style="width: 95%; height: 25px;" type="text"/>	Job Type* <input style="width: 95%; height: 25px;" type="text" value="RunAllAnalyticsJob"/>
Analytics Categories* <input style="width: 95%; height: 25px;" type="text" value="Select..."/>	Analytics Subcategories <input style="width: 95%; height: 25px;" type="text" value="Select..."/>
Analytics Application <input style="width: 95%; height: 25px;" type="text" value="Select..."/>	
Advance Option <input checked="" type="checkbox"/>	
<input style="width: 95%; height: 40px;" type="text" value="and analyticsName='Email to list all the details of their subordinates.'"/>	

Step 2) Global Configuration Setting for Below Example

Go to **Admin > Global Configurations > Analytics** and select **Group Analytics Emails by Username**.

- Group emails by username**
When this option is enabled, the analytics emails sent during control execution will be grouped based on the username else every user will receive separate emails for every line item

Step 3) Configuring Email Templates

1. Select **Admin > Settings > Email Templates**.
2. Click **Create Email Template**.
3. Provide values in **Email Template** by selecting the required email parameters.
4. Click **Create**.

Fields	Description
Content as HTML	Select whether you want to create the template without HTML tags. HTML tags are available in the template.

	<ul style="list-style-type: none"> • True - This setting instructs the template editor to remove some tags. • False - This setting retains all the tags. It is a recommended setting.
From	Specify the email ID of the user sending the notification. Note that email notifications can also be system generated.
Name	Specify the name of the user or the system sending the notification.
To	Specify the email ID of the recipient.
Cc	Specify the email ID of the user or system for publicly informing them about the email.
Bcc	Specify the email ID of the user or the system for privately informing them about the email.
Subject	Specify the email subject describing the intent of the email.

Example: - Email to list all the managers and the details of their subordinates.

```

To:
${userEmail}

CC:
${ANALYTICSDATAMAP.get("REPORTEE EMAIL")}

Body: ${ANALYTICSDATAMAP.get("MANAGER")},
Please find the details of your reportee -
Name: ${ANALYTICSDATAMAP.get("REPORTEE NAME")}
Email: ${ANALYTICSDATAMAP.get("REPORTEE EMAIL")}
Title: ${ANALYTICSDATAMAP.get("TITLE")}
Start Date: ${ANALYTICSDATAMAP.get("START DATE")}

```

Note: All the variables are derived from the columns of the control created earlier. The user Email variable is derived from the username column and all others are directly coming from the control.

SAVIYNT | Admin

Email Template List

Admin > Configurations > Email Template List > Create Email Template

Create Email Template

Email Template List

Email Template

Advanced HTML CSS

Content As HTML: True False

From:

Name: Email to list all the managers and the details of their subordinates.

To: \${userEmail} Bcc

Cc: \${ANALYTICSDATAMAP.get("REPORTEE EMAIL")} X

Subject: Reportee Details

`$(ANALYTICSDATAMAP.get("MANAGER"))`

Please find the details of your **reportee** -
 Name: `$(ANALYTICSDATAMAP.get("REPORTEE NAME"))`
 Email: `$(ANALYTICSDATAMAP.get("REPORTEE EMAIL"))`
 Title: `$(ANALYTICSDATAMAP.get("TITLE"))`

Step 4) Updating Existing Control

1. Select **Intelligence > Analytics Configuration List**.
2. Select the control that you created earlier to add the email template to.
3. In the **Analytics Configuration Details** page that displays, click **Edit**.
4. In the **Edit Analytics Configuration** page that displays, select the “Send Email As Attachment” option and select the above email template.
5. Click **Update**.

SAVIYNT | Intelligence

Edit Email to list all the managers and the details of their subordinates...1

Analytics > Analytics Config List > Edit Analytics Config

Edit Email to list all the managers and the details of their subordinates...1

Analytics Name *

Display Name

Analytics Query * @

Description

Allowed Action

Owner

Category *

Information Refresh

Base *

Base Count @

External Connection

Where do you want to save your data?

Enable Anchoval @

Number of History to Keep @

Save Data

Control

Save To File

Send Email As Attachment
 Email Template @
 Save Data
 Control
 Save To File

6. Run the job and based on the email template the emails will be sent.