

Configuring Email Templates

This section explains how to create, delete, and modify an e-mail template. On the **Configuration** menu, click **Email Templates** to view default and custom created template types. To view email templates, you must have the Email Template View permission, and in order to create, delete, or modify them, you must have the Email Template View and Email Template Manage permissions.

The following describes the available email template types:

- **Access Delegation.** Used when notifying users of assigned access delegations.
- **Assessment.** Available for selection in assessment workflows.
- **Analytics.** Available for selection in the Administration application when a report or dashboard is sent to the user.
- **Control.** Available for selection in the policy workflow.
- **Ticket.** Available for selection in the ticket workflow.
- **Incident.** Available for selection in the incident workflow.
- **Exceptions.** Available for selection in the exception workflow.
- **Finding.** Available for selection in the finding workflow.
- **Alerts.** Sent for events, such as an entity scoring higher for risk or compliance than the threshold.
- **Escalation.** Used when ticket deadlines are reached.
- **Reports.** Sent for report notifications.
- **Vendor.** Used to notify primary vendor contact of changes.

Updating Email Template

Modifications to email templates take effect immediately.

To update an e-mail template:

1. Go to **Configuration > Email Templates**.
2. Select a template and then click **Details**.

The template opens in a pane below the grid.

3. Click **Edit**.
4. In the **General** section, edit the following settings:
 - **Display Name.** Enter the short name for the template.
 - **Template Type.** Select the workflow type.

- **Content Type.** Select either HTML or Plain text content type of a template.
- **Description.** Enter information that will help others understand the use of the template.
- **Send Immediately. Select to send the notifications without sequencing.**
- **High Priority.** Select to send the notifications with high importance.
- **Sender Email Account.** Select the email account of the sender to send the notifications. By default, the RiskVision administrator's email account is used for sending email notifications.
- Template text. Author information that suits the template type.

5. When you finish modifying the template, click **Save**.

The new template is now available.

Adding A New Customized E-mail Template

Users with sufficient privileges can create new e-mail templates for later use.

To create an e-mail template:

1. In the RiskVision application, go to **Configuration > Email Templates**. In the Administration application, go to **Administration > Email Templates**.
2. Click **New**.
3. In the **General** section, enter the following fields:
 - **Name.** Enter the display name that users select when setting up a workflow.
 - **Template Type.** Select the workflow type.
 - **Content Type.** Select either HTML or Plain text content type of a template.
 - **Description.** Enter information that will help others understand the use of the template.
 - **Send Immediately.** Select to send the notifications without sequencing and/or merging. See also Sequencing and Merging of Email Notifications.
 - **High Priority.** Select to send the notifications with high importance. By default, all of the escalation email templates are sent with high priority.
 - **Sender Email Account.** Select the email account of the sender to send the notifications. By default, the administrator email account is used for sending email notifications.

4. Enter the message content.

Resolver recommends basing new templates on one of the defaults.

5. Click **Save**.

The email template is now available for selection in workflow templates.

To understand how an email template can be used to notify the stakeholders, see [Setting up Email Notifications](#).

