



How to Configure Email Message Templates

Version 1.0

Purpose

This document describes the Email Message Template Editor feature and provides instructions for configuring and working with each of its components.

This document is intended for tenant admin users.

Related Resources

- [Appendix A: Do's and Don'ts of editing HTML messages](#)
- [Email Message Best Practices Quick Reference](#)
- [Starfish Best Practice Email Templates for EARLY ALERT](#)
- [HTML code examples that can be pasted into templates \(BasicHTML.txt\)](#)

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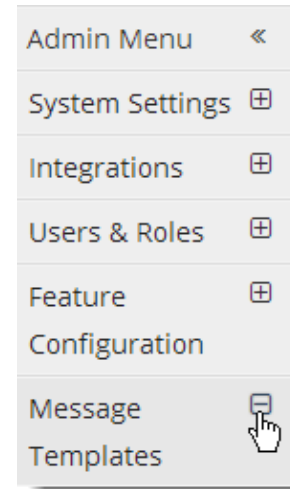
About the Email Message Template Editor

The Email Message Template Editor puts the power of highly customizable email messages in your tenant admin's hands, replacing the prior method that required you to work through your Starfish implementation manager when making changes to your email notification templates.

This feature is reached via the **Message Templates** section of the **Admin** menu

The Email Message Template Editor includes four components that work together to allow you to create customized email messages that you can assign to relevant Starfish activities such as raising tracking items, launching progress surveys, or making appointments. Each of the following components is covered in greater detail in its own section of this document:

1. [Settings](#): Global default values for messages sent from Starfish.
2. [Snippets](#): Custom reusable text that can be included in templates.
3. [Templates](#): Defined message layouts that include at a minimum 1) a from address, 2) a subject, and 3) a message body. Templates may also include html links, variable field values (template fields), snippets or advanced field content.
4. [Advanced Fields](#): criteria-based content that can be included in templates.

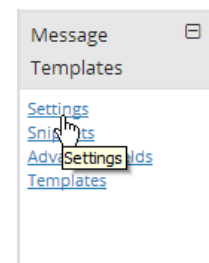


The message template editor allows you to preview and send samples of templates – including those you've created, as well as old templates created by your implementation manager and Starfish default templates that are included in all Starfish tenants. This functionality is covered in more detail in the [Working with existing templates](#) section.

Settings

Select **Settings** from within the **Message Templates** section of the **Admin** menu to display the **Configure System Email Settings** page.

From here you can view and edit the global default settings for your Starfish system's email templates. These settings are used for all emails sent from Starfish.



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Current values will be displayed in each of the fields presented. Make any desired updates and click the **Save** button to update your settings.

Configure System Email Settings

Starfish allows institutions to configure some basic content for all of their email templates. For example, a custom, formatted header or footer could be specified to be added to all emails sent to users from Starfish, or a standard BCC or From email address could be designated. If applicable, specify these settings below.

* **Default From Email Address** ?

Default Reply-To Email Address ?

Default BCC Email Address ?

Subject Prefix ?

System Email Header

B I U | | | | </>

A message from Excellent University:

System Email Footer

B I U | | | | </>

Visit the [Excellent University Resource Center](#) online

Never Mind **Save**

Changes made here will impact all emails sent from Starfish after the changes have been made. There may be a brief delay before your changes take effect (a few minutes). See the following sections for more information on System Email Settings:

- [Address Fields](#)
- [Subject Prefix](#)
- [System Email Header and Footer](#)

Address fields

Current values for your tenant are displayed in the address fields. You can edit the values to any validly formatted email address.


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These default address values are used on any emails where the individual template does not have its own value for these fields, or when the template value cannot be used (for example if the flag raiser is specified as the **from** address in the template but the template is used with a system-raised flag).

- **Default From Email Address** is required.
- **Default Reply-To Email Address** is optional, but is useful for specifying a single email address to handle replies initiated by students or staff to Starfish emails.
- **Default BCC Email Address** is optional and not used frequently at the global level.

Subject Prefix

The current value for **Subject Prefix** is displayed in this field. This value is optional but is recommended for identifying and branding notifications coming from your Starfish System.

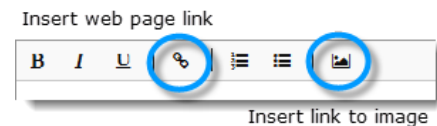
 **Best Practice:** Use **[Subject Prefix]** to set the prefix off from the rest of the message subject.


 **Note:** This value will be included on all emails sent from Starfish. This prefix cannot be replaced on a template by template basis.

System Email Header and Footer

System Email Header and **System Email Footer** are optional. Current values are displayed, but may be blank.

General formatting (e.g. bold, italic) can be included in your header and footer. Links to a web page or web image can be included also.

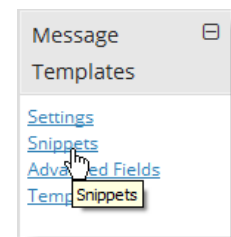


 **Note:** Header or footer content specified here will be included on all emails sent from Starfish. You cannot replace the system header or footer on individual templates

Snippets

A snippet is a named block of text that can be included in a message template or in an advanced field. This can save time and effort if you have repetitive content.

Select **Snippets** from the **Message Templates** section of the **Admin** menu to display the **Manage Snippets** page.



See the following sections for information about how to use the Manage Snippets page to:

- [Create a snippet](#)
- [Search for snippets](#) by name or description,
- [Edit copy or delete](#) existing snippets.

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







Manage Snippets

Snippets are custom text that can be reused in many message templates. Snippets that are created here will be available in the template editor for insertion in any message template.

[+ Create Snippet](#)

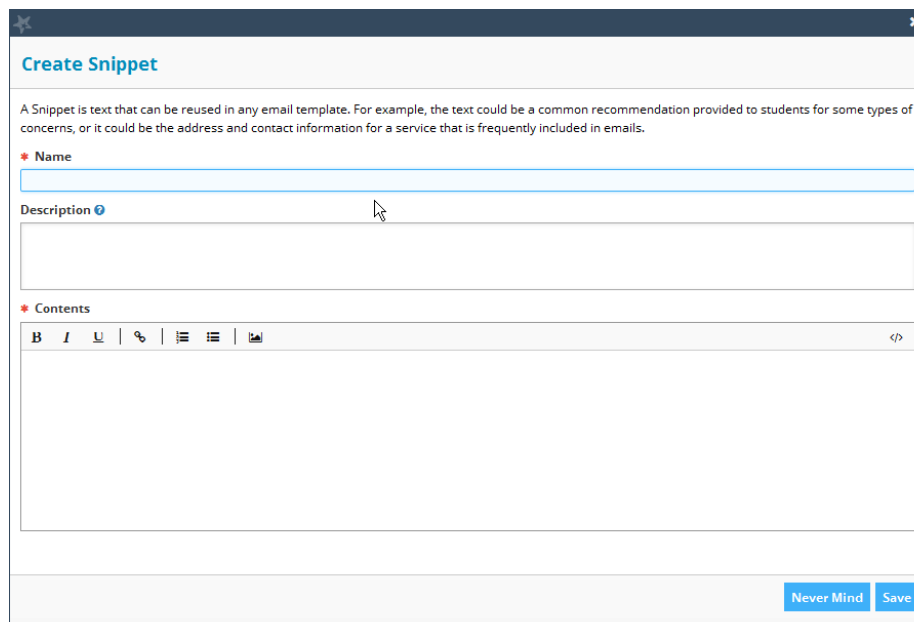
Search

Search

Name ▲	Description	Used in Templates	Tools
Call to action for Students	Initial paragraph, general language intended to follow an initial - you have been flagged for xxx	1	  
Closing paragraph and signature, flag raise email	This is the last paragraph plus signature line for manually raised course-based flags (raised by instructor)	1	  
Survey announcement - paragraph 1 to instructors	Survey announcement - paragraph 1 to instructors	0	  
What to bring to your appointment - student	for students - list of documents to bring to any appointment	1	  

Create a snippet

1. Click the **Create Snippet** button. The **Create Snippet** page is displayed



The 'Create Snippet' form is displayed in a modal window. It includes a title bar with a close button. The form has three main sections: 'Name' with a required field (marked with a red asterisk), 'Description' with an optional field (marked with a blue question mark icon), and 'Contents' with a rich text editor. The rich text editor has a toolbar with buttons for bold, italic, underline, link, unlink, bulleted list, numbered list, and image. At the bottom right of the form are two buttons: 'Never Mind' and 'Save'.

2. Enter the **Name** and **Description** for your snippet. **Name** is required.

Although **Description** is not required, it is highly recommended to help keep track of the purpose and contents of each snippet. Both fields are displayed on the **Manage Snippets** page, and are included when you use the search feature. They are also displayed in the drop down list when selecting a snippet to include in an email template.

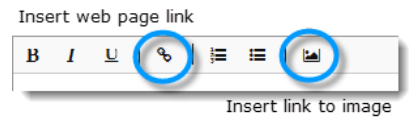
The list of snippets on the **Manage Snippets** page can be sorted by snippet name.

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3. Enter and format your snippet **Contents**.

Type directly into the **Contents** text box, or use copy/paste to paste content from another source. Formatting from another source may be stripped when pasted. See [Appendix A](#) for more tips on editing an HTML message.

Use the options in the editing bar (e.g. bold, italics and underline) to format your text. You can also include links to a web page or web image address.



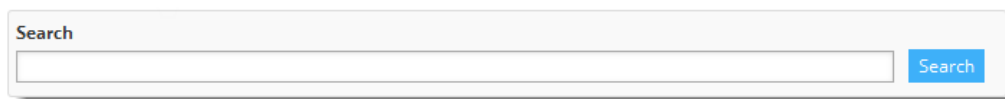
4. Click the **Save** button.

The new snippet is now available to be included in your templates. Snippets you create will be listed in alphabetic order by name on the **Manage Snippets** page.

Search for snippets




Use the text box on the **Manage Snippets** page to identify your search criteria.

When you click the **Search** button, the results will include those snippets whose name or description (or combination of name and description) matches **all** the words that you entered. If you can't find the snippet you are looking for, try reducing the number of search words.

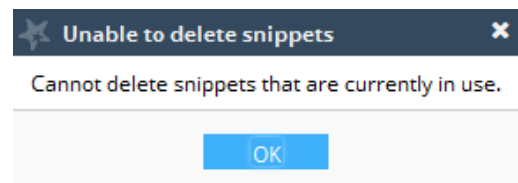
A screenshot of the search bar on the Manage Snippets page. It consists of a text input field with the placeholder text 'Search' and a blue 'Search' button to its right.

Edit copy or delete snippets

You can edit, copy, or delete your snippets using one of the icons listed to the right of the snippet on the **Manage Snippets** page.

-  **Edit:** Use the edit icon to modify an existing snippet.
-  **Copy:** Use the copy icon to create a copy of an existing snippet that can be edited.
-  **Delete:** Select the delete icon (x in a circle) to delete a snippet.












Note: If you attempt to delete a snippet that is in use in any templates, you will receive an error message indicating that you cannot delete the snippet.



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Hover over the number listed for the snippet in the “Used in Templates” column to display the names of the templates that are using the snippet.

You will need to edit each of the templates listed to remove the snippet from within the body of the template before deleting the snippet itself.

Used in Templates	Tools
2	  
1	  
0	 
1	  

Standard template - Student

Templates

A template defines the format and content to be used when an email is sent from Starfish.

As part of feature configuration, you attach templates to each event that triggers an email.

For example, you might attach the “*Attendance Concern Student Template*” to the student role on an attendance flag (illustrated right).

User Flagged Student

Privileges

- ☐ Raise
- ☒ View
- ☐ Manage ?
- ☒ Email

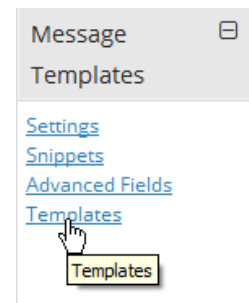
Select Email Templates ?

Raise Email Attendance Concern Student Template

Select **Templates** from the **Message Templates** section of the **Admin** menu to display the **Manage Templates** page.

See the following sections for more information on how to use the **Manage Templates** page to:

- [Create a template](#)
- [Work with existing templates.](#)




























Manage Templates

[+ Create Message Template](#)

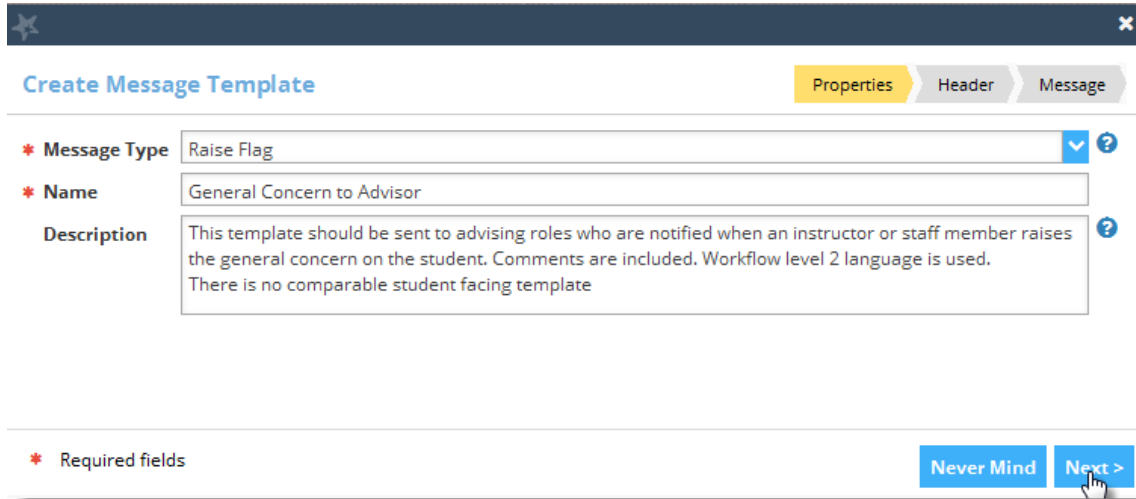
Search Search

Type Show All Templates

Name	Type	Permissions	Tools
Add Appointment for student - Basic appointment email for students who make an appointment for any advising appointment type	📅 Appointments: Add Appointment	Editable	    
Attendance Concern (Recommended) - Message sent to student when flagged for Attendance Concern. Comes from Flag Raiser. Includes Raiser's comments.	🚩 Flags: Flag Notification (Old)	Read Only	    
Attendance Concern to Student - This template is intended to be sent to the student when the attendance flag is raised Includes flag name and course name in subject and body. Includes instructor notes if provided. Includes level 1 call to action snippet.	🚩 Flags: Raise Flag	Editable	    
Cancel Template for Provider - Requests that they reschedule	📅 Appointments: Cancel Appointment	Editable	    
Cancel Template for Student - Requests that they reschedule	📅 Appointments: Cancel Appointment	Editable	    

Create a template

1. Click the **Create Message Template** button from the **Manage Templates** page. This opens the **Properties** step of the **Create Message Template** wizard.




The screenshot shows the 'Create Message Template' wizard in the 'Properties' step. The title bar includes a star icon and a close button. The wizard has three tabs: 'Properties' (active), 'Header', and 'Message'. The 'Properties' section contains three fields: 'Message Type' with a dropdown menu showing 'Raise Flag', 'Name' with a text input containing 'General Concern to Advisor', and 'Description' with a text area containing 'This template should be sent to advising roles who are notified when an instructor or staff member raises the general concern on the student. Comments are included. Workflow level 2 language is used. There is no comparable student facing template'. A legend at the bottom left indicates that red asterisks mark required fields. At the bottom right, there are two buttons: 'Never Mind' and 'Next >', with a mouse cursor clicking on 'Next >'.

Add Properties


2. Select a value for **Message Type** from the drop down list.


The message type defines the type of activity to which you can attach the template. For example, if you select “Raise Flag” as the type, this template can be used for email notifications associated with raising a flag. Each template can have only one type.

3. Enter the **Name** for the template. Use a name that will make this template easy to identify within your template library and one that defines its purpose.

 **Best Practice:** Include the intended recipient roles as part of the name. (E.g. to Student, for Advisors, Instructor, Staff)

4. Enter the **Description** for the template. A description is not required, but is highly recommended.

 **Best Practice:** Use a description that helps you to remember why you created this particular template/how it is intended to be used. Include in the description things like whose email appears as the “from” address, whether or not comments are included, or what other fields or snippets it includes.

 **Note:** Both the name and description will be presented to a tenant admin user when selecting templates to be associated with an item.

5. Click the **Next** button. The **Header** step of the wizard is displayed.

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Create Message Template

Properties | **Header** | Message

* **From** Email Address ▼ starfish@excellentu.edu

Reply-to Email Address ▼ starfish-replies@excellentu.edu

BCC Email Address ▼ Enter a "BCC" email address

* **Subject** {~}

General Concern regarding your student Student Full Name

* Required fields

Never Mind < Back Next >

Add Header

- Update the **From** and **Reply-to** email addresses. The email addresses you specified in your [global message template settings](#) will auto populate in their respective fields in the template.

You can override those defaults by typing a different email address in the desired field, or by selecting the Role option from the drop down associated with each address field.

When you select Role from the drop down associated with the From field, the text box associated with this field is replaced with a drop down list that includes available roles from whom the template could be sent.

For example, flag raise templates may be configured to be sent from the person who raised the flag, or the instructor associated with the course related to the flag.

* From Role ▼

- Flag Raiser
- Instructor
- TA

Best Practice: Use these options with consideration for their intended use. For example, do not use the Flag Raiser option for templates that will be attached to system-raised flags; do not use the instructor option if the template will be used for flags where there may not be a course context, or where there may be multiple instructors associated with the flagged course.

- Enter a **Subject** for the template. A subject is required for all templates.

The subject you type here will follow the subject prefix set in your message template settings (visible when you preview the template).

Your subject can include plain text and/ or fields, such as the student name, flag name, or course name. Click the **Insert Field** icon ({...}) to add fields. (See the section titled [Template Fields](#)).


- Click the **Next** button. The **Message** step of the wizard is displayed.


The screenshot shows the 'Create Message Template' wizard in the 'Message' step. The interface includes a title bar, a breadcrumb trail (Properties > Header > Message), and a main content area. The 'Email Message Template' section contains a rich text editor with a toolbar (Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Source Code) and a text area. The text area contains the following content: 'Advising Team,' followed by 'The [Flag Name] flag has been raised on [Student Full Name] [Student Id].', then a paragraph: 'Please assign a team member to reach out to this student and update the flag in Starfish based on your results. Based on our workflow, this flag should be updated within 1 business day of the alert being sent.', and finally a placeholder: '[Level 2 Workflow paragraph for staff]'. Below this is the 'SMS Message Template' section, which contains a text area with the text: '[Flag Name] on [Student Full Name]. Response is needed within 1 day.' At the bottom, there is a legend for 'Required fields' and three buttons: 'Never Mind', '< Back', and 'Finish'.


Add Message

- Enter content for the body of your **Email Message Template**. The message body can include HTML text and hyperlinks. See [Appendix A](#) for more tips on editing an HTML message.

Additionally you can include template fields, snippets and advanced fields. Each of these options has a distinct purpose and workflow:

 **Template Fields** are variables created/ edited as part of each template. Each field can include prefix and suffix text, and alternative text to be used if the variable is null. Click the **Insert Field** icon to select from a list of available fields. Add desired text and insert the field into your template. (See the [Template Fields](#) section for details).

 **Snippets** are created/ edited outside of a template. Snippets provide for reuse of common content across templates. Click the **Insert Snippet** icon to select a snippet and insert a placeholder for the snippet into your template. (See the [Snippets](#) section for details).

 **Advanced Fields** are created/ edited outside of a template. Advanced fields allow for criteria-based content within an email template. Click the **Insert Advanced Field** icon to select an advanced field and insert a placeholder for the advanced field into your template. (See the [Advanced Fields](#) section for details).

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10. Enter content to be used for an **SMS Message** (text message). If students have opted to receive Starfish emails via mobile phone, this is the version of the message that will be sent. Template fields and snippets can be included, but the template should be kept to 140 characters or less.
11. Click the **Finish** button to save your template.


Template Fields

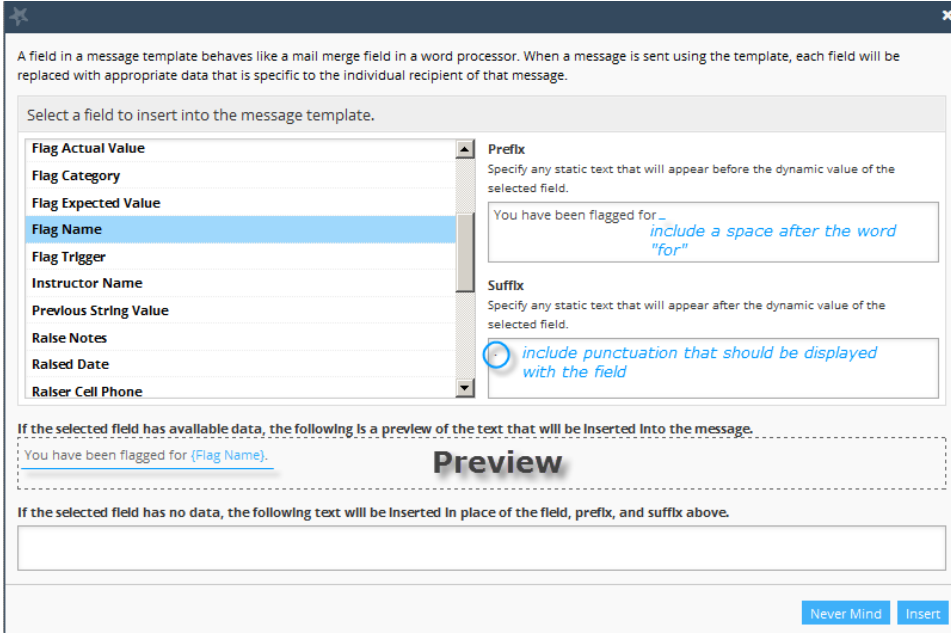
Within the subject and body of your email or SMS text message, you can include variable fields such as the student's name, tracking item name, or relevant course name.

A field in a message template behaves like a mail merge field in a word processor. When a message is sent using the template, each field will be replaced with appropriate data that is specific to the individual message. You can customize each field by including:

- a **prefix** to appear before the field value in your template,
- a **suffix** to appear after the field value in your template, or
- **alternative text** to be displayed when the field value is null.

Insert a field

1. Click the **Insert Field** icon. () This opens the field selection dialog page (illustrated below) where you can select and customize the display of a field.




A field in a message template behaves like a mail merge field in a word processor. When a message is sent using the template, each field will be replaced with appropriate data that is specific to the individual recipient of that message.

Select a field to insert into the message template.

Flag Actual Value	Prefix Specify any static text that will appear before the dynamic value of the selected field. You have been flagged for _ <i>include a space after the word "for"</i>
Flag Category	
Flag Expected Value	
Flag Name	
Flag Trigger	
Instructor Name	
Previous String Value	
Raise Notes	
Raised Date	
Raiser Cell Phone	

Suffix
Specify any static text that will appear after the dynamic value of the selected field.

 *include punctuation that should be displayed with the field*

If the selected field has available data, the following is a preview of the text that will be inserted into the message.

You have been flagged for (Flag Name).

Preview

If the selected field has no data, the following text will be inserted in place of the field, prefix, and suffix above.

Never Mind Insert

2. **Select a field to insert** from the list displayed on the left. The fields available are dependent on the template type selected during template creation (see [Add Properties](#)).

When you select a field, it is displayed in the field preview box below the list of fields.

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3. Enter text for **Prefix** and **Suffix** (optional). In the text boxes provided, type any desired prefix and suffix text that should display in the email with your selected field. After you have typed a value in either box, move to another text box on the page to update the preview.

When typing, include spacing and punctuation in your prefix and suffix text such that the preview appears as you expect it to be displayed in the email.

4. Enter **alternative text** (optional). Enter text that should display instead of `<prefix +field+ suffix>` if the value for the selected field is null.

A field in a message template behaves like a mail merge field in a word processor. When a message is sent using the template, each field will be replaced with appropriate data that is specific to the individual recipient of that message.

Select a field to insert into the message template.

Log trigger
Instructor Name
Previous String Value
Raise Notes
Raised Date
Raiser Cell Phone
Raiser Email
Raiser Name
Raiser Phone
Student Cell Phone

Prefix
Specify any static text that will appear before the dynamic value of the selected field.
Your instructor provided the following comments:

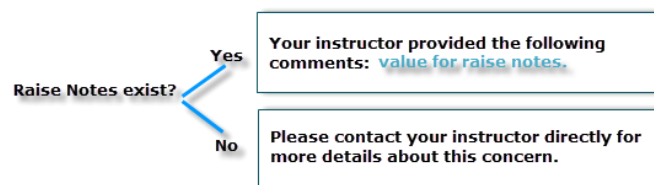
Suffix
Specify any static text that will appear after the dynamic value of the selected field.

If the selected field has available data, the following is a preview of the text that will be inserted into the message.
Your instructor provided the following comments: {Raise Notes}

If the selected field has no data, the following text will be inserted in place of the field, prefix, and suffix above.
Please contact your instructor directly for more details about this concern.

Never Mind Insert

Using the **Raise Notes** example above, the resulting message could be either of these:



Common fields where you might use alternative text include:

- **Raise Notes** (as illustrated above)
- **Course Name** or **Course ID** (e.g. either *in {Course Name}*, or *in one of your courses*.)

5. Click the **Insert** button. This saves your customized field and inserts it into your template.

Edit an inserted template field

1. Click on the **field name** placeholder for the field to be edited. This opens the field selection dialog box.



Note: Once you have inserted a template field into your template, an edit icon (pencil) appears with the field placeholder in the template. This is in contrast to placeholders for snippets and advanced fields which cannot be edited within a template.























2. Edit your selections for the field. You can modify prefix, suffix, and alternative text. You can also select a different field entirely to replace the one you created.
3. Click the **Save** button. Your edited field has replaced the prior version.

Working with existing templates

The **Manage Templates** page lists all templates available to your Starfish system.

This list may include templates from some or all of the sources listed below. Actions that can be taken with a template are dependent on the source as noted and fall into two broad categories: [Editable](#) and [Read Only](#). See the [Search and Filter section](#) for more information on filtering your list. See the following sections for more information on available actions:

- [Preview and send sample templates](#)
- [Edit copy or delete templates](#)

Manage Templates			
+ Create Message Template			
Search	Type	Show	
<input type="text"/>	<input type="text"/>	All Templates	
<input type="button" value="Search"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	
Name	Type	Permissions	Tools
Add Appointment for student - Basic appointment email for students who make an appointment for any advising appointment type	📅 Appointments: Add Appointment	Editable	   
Attendance Concern (Recommended) - Message sent to student when flagged for Attendance Concern. Comes from Flag Raiser. Includes Raiser's comments.	🚩 Flags: Flag Notification (Old)	Read Only	   
Attendance Concern to Student - This template is intended to be sent to the student when the attendance flag is raised Includes flag name and course name in subject and body. Includes instructor notes if provided. Includes level 1 call to action snippet.	🚩 Flags: Raise Flag	Editable	   
Cancel Template for Provider - Requests that they reschedule	📅 Appointments: Cancel Appointment	Editable	   
Cancel Template for Student - Requests that they reschedule	📅 Appointments: Cancel Appointment	Editable	   

Editable vs. Read Only templates

Editable templates

- **New Best Practice templates:** These templates were created by Starfish using the message template editor and copied to your Starfish tenant as part of its creation. If your tenant was created after the introduction of the message template editor feature (June 2014), you will see these templates.

These templates will include the word **(Recommended)** in the template name, and **will not** have **(old)** as part of the **Type**.

These templates can be previewed, edited, copied or deleted.

- **New Institution templates:** These are templates that are created by your institution using the email message template editor.

The **Type** **will not** include the word **(old)**.

These templates can be previewed, edited, copied or deleted.

Read Only templates

- **Old institution templates:** These are templates that were customized for you by Starfish prior to availability of the message template editor. If your tenant was created prior to availability of the message template editor (June 2014), the templates that you worked on with your implementation manager are this type.

These templates **will** have the word **(old)** in the **Type**.

These templates can be previewed but **not** edited, deleted, or directly copied, but can continue to be attached to Starfish tracking items and events.

- **Old Best Practice templates:** These are templates created by Starfish and included on your tenant if it was created prior to availability of the message template editor feature (June 2014).

These templates have **(Recommended)** in the name and **will** have the word **(old)** in the **Type**.

These templates can be previewed but not edited, deleted, or directly copied, but can continue to be attached to Starfish tracking items and events.

- **Starfish Default templates:** These are default templates created by Starfish.

These templates can be previewed but **not** edited or deleted. If a default templates has been created with the message template editor feature it can be copied (copy icon is not dimmed).

These templates can continue to be attached to Starfish tracking items and events.

Search and filter templates

You can filter your list of templates using several options including:

- **Search:** Enter key words into the search box. Click the **Search** button to filter the list to only those templates that include the values you entered in either the template name or description.
- **Type:** Select the type of template(s) to display based on the Starfish activity that it relates to. Click on the section heading within the drop down list (e.g. click on the subheading labeled **Flags** to filter to templates related to any of the listed flag events, or click on individual template types such as **Raise Flag**.

Template types designated with **(old)** indicate a template type that existed prior to the message template editor's release (June 2014). For example **Flag Notification (old)** represents a flag notification template that was created by your implementation manager prior to the introduction of the email template editor to be used with the flag raise event, whereas **Raise Flag** represents a template created with the message template editor to be used with the raise flag event

- **Show:** Select whether to show all templates in your list or limit the list to **Read Only** or **Editable** templates. **Read Only** templates will generally coincide with templates designated as (old) within their type and **Editable** will coincide with items created with the new message template editor.

Preview and send sample templates

You can preview or send a sample email of any of the templates in your list. Content of the preview or sample includes:


- Actual values and formatting from your **Settings** for addresses and Subject prefix
- Formatted content
- **Prefix** and **Suffix** text around a sample variable value for each field in the template. Sample variable values include:
 - **{Flag name}**: Attendance Concern
 - **{Student name}**: Rachel Lands
 - **{Course name}**: Microbiology
 - **{Raise notes}**: Rachel missed 3 classes this month.
- **Snippet** content for snippets in the template
- **Advanced field** alternative text will be shown as a placeholder for variable content

Preview template

Select preview to display a representation of how your template will look when delivered.

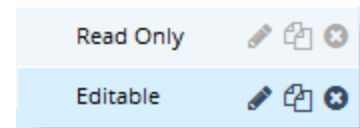
Send Sample template


Select send sample and specify an email address to which to deliver a sample of the template.


 **Best Practice:** Use the sample option to verify how the content will display in commonly used email clients.


Edit, copy or delete templates

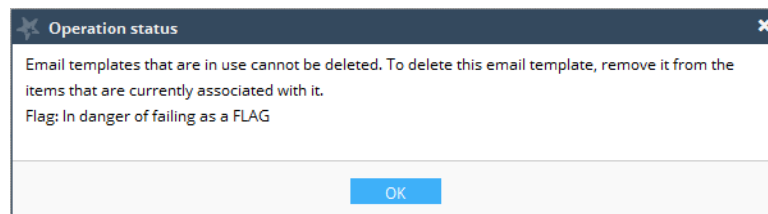
The edit, copy, and delete icons associated with a template will be dimmed if the action cannot be taken on the template (i.e. Read Only templates).



 **Edit:** make changes to content in a template. The template **type** cannot be edited.

 **Copy:** create a copy of your template. By default the new templates name will be Copy of 'template name'. Template type cannot be modified on a copied template.

 **Delete:** delete an existing template. If you select a template that is attached to an item or event, you will receive a message indicating that the template cannot be deleted. The message will list the items that are using the template.



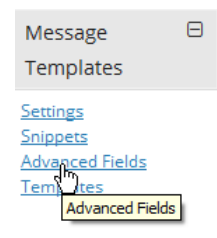
Advanced Fields

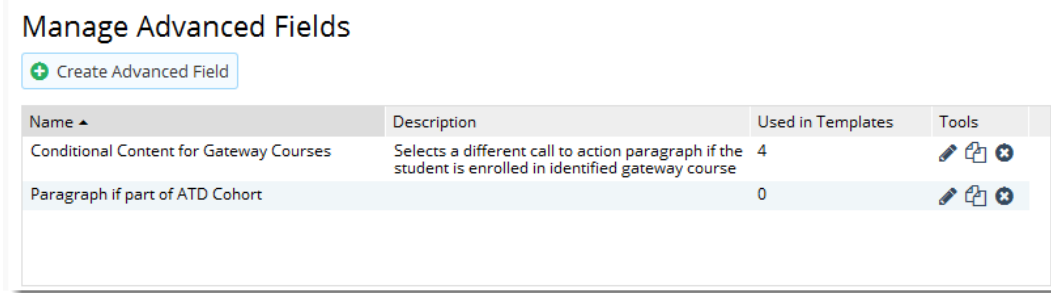
An advanced field allows an email template to include criteria-based content. Criteria can include existing cohorts or course sections in Starfish.

Select **Advanced Fields** from the **Message Templates** section of the **Admin** menu to display the **Manage Advanced Fields** page.

See the following sections for information about how to use the **Manage Advanced Fields** page to:

- [Create an advanced field](#)
- [Edit copy or delete an advanced field](#)





Create an advanced field

1. Click the **Create Advanced Field** button on the **Manage Advanced Fields** page.

The **Properties** page of the **Create Advanced Field** wizard is displayed.

2. Select a **Message Type**. Each advanced field must be associated with a message type. This drives which fields are available to be used in your criteria.
3. Enter a **Name** and **Description** for your advanced field.

Name is required, description is optional but highly recommended to help you keep track of the purpose and contents of each advanced field. Both fields are displayed on the **Manage Advanced Fields** page, and both are displayed in the drop down list when selecting an advanced field to include in a template.

Create Advanced Field [Properties] [Criteria]

* **Message Type** [Raise Flag] [v] [?]

* **Name** [Advising Center Information]

Description [Select the advising center information to include based on student's campus] [?]

* Required fields [Never Mind] [Next >]

4. Click the **Next** button. The **Criteria** page of the wizard is displayed.

How to Configure Email Message Templates

- Click the **Add Criteria** button. The **New Criteria** page is displayed.

The screenshot shows the 'Create Advanced Field' dialog box with the 'Criteria' tab selected. It contains a text area explaining that an Advanced Field can be specified to allow different text to be displayed in the email based on different criteria. Below the text is an 'Add Criteria' button. A table with columns 'Order', 'Type', 'Criteria', 'Display', and 'Tools' is visible. At the bottom, there are buttons for 'Never Mind', '< Back', and 'Finish'.

- Select the type of **Criteria**. Criteria can be either **Course Context** or **Student Cohort** based.
 - If you select **Course Context**, enter a course section id or course pattern (e.g. BIOL101*).
 - If you select **Student Cohort**, select an existing cohort from the drop down list.
Note: Only cohorts that have been added to Starfish using the Cohorts feature are available.
- Select the desired snippet or field from the **Display Type** drop down list. Scroll through the list to the heading for the desired type of content (**Fields** or **Snippets**) and select the item to be displayed for the criteria you entered.

The first screenshot shows the 'New Criteria' dialog box with the 'Criteria' tab selected. The 'Criteria' section has 'Student Cohort' selected, and the 'Display Type' section has 'Advising Services - East Campus' selected. The second screenshot shows the 'New Criteria' dialog box with the 'Criteria' tab selected. The 'Criteria' section has 'Student Cohort' selected, and the 'Display Type' section has 'Advising Services - East Campus' selected. The 'Display Type' dropdown is open, showing a list of options including 'Student Cell Phone', 'Student Email', 'Student Full Name', 'Student Id', 'Student Phone', 'Advising Services - Downtown', 'Advising Services - East Campus', 'Call to action - 1st year cohort', 'Call to action for Students', and 'Closing paragraph and signature, flag raise email'.

- Click the **Submit** button to save this criterion.

9. Add additional criteria by repeating steps 5 - 8
10. Prioritize the order in which the criteria should be evaluated. Use the arrows on the left to move criteria up or down in the order. The recipient will receive the content for the first matching item.

The screenshot shows the 'Create Advanced Field' dialog box with the 'Criteria' tab selected. It includes a table for defining criteria and a text area for fallback content.

Create Advanced Field Properties **Criteria**

An Advanced Field can be specified to allow different text to be displayed in the email based on different criteria. For example, a different snippet of text could be displayed for different students dependent on their membership in different cohorts. Select one or more criteria that should be evaluated and the text that should be included in the message template if the student meets the criteria. If a student meets more than one criteria for the Advanced Field, the text for each criteria will be displayed in the order in which it appears in the grid below.

Add Criteria

Order	Type	Criteria	Display	Tools
↓	COHORT	Main Campus	Advising Services - Downtown	✎ ✕
↑	COHORT	East Campus	Advising Services - East Campus	✎ ✕
↑	COHORT	South Campus	Copy of Advising Services - Sout...	✎ ✕

If none of the above criteria are matched, the following text will be inserted instead.

Select the Advising Center nearest the campus where you will register for classes. You can find a full listing of Advising Offices at <http://www.excellent.edu/Advising>

* Required fields Never Mind < Back Finish




11. Enter text that should display **if none of the above criteria are matched** (optional). If there is content that should be displayed when none of the criteria are met, enter it into the text box below the criteria table.

If nothing is entered, students who do not meet the criteria will see no content related to the advanced field.

12. Click the **Finish** button to save your **Advanced Field**.

Edit, copy or delete advanced fields

You can edit, copy, or delete your advanced field using one of the icons listed to the right of the advanced field on the **Manage Advanced Fields** page.

-  **Edit:** Use the edit icon to modify an existing advanced field.
-  **Copy:** Use the copy icon to create a copy of an existing advanced field that can be edited.
-  **Delete:** Select the delete icon (x in a circle) to delete an advanced field.

How to Configure Email Message Templates












Note: If you attempt to delete an advanced field that is in use in any templates, you will receive an error message indicating that you cannot delete the advanced field.

You must first remove the advanced field from the templates where it is in use.

Hover over the number listed for the advanced field in the **“Used in Templates”** column to display the names of the templates that are using the advanced field.



You will need to edit each of the templates listed to remove the advanced field from within the body of the template before deleting the advanced field itself.





Used in Templates	Tools
2	  
1	  
0	Standard template - Student  
1	  


Appendix A: Dos and Don'ts of editing HTML messages

Copy/Paste


-  **DO: Copy/paste content from a plain text editor.** To copy content from another source document, first paste it into a plain text editor like notepad to strip any formatting code. When you copy/paste from another source directly, the formatting codes may appear to be intact, or may be stripped. Some codes may be hidden. In each case your browser may attempt to interpret them unsuccessfully. To ensure the best results, paste only from a plain text editor such as notepad and then use the formatting options within the template editor.
-  **DON'T: Attempt to copy /paste Starfish fields, snippets, or advanced fields within the message template editor.** Put the cursor where you want the field to appear. You can move the text around the fields or snippets, but you cannot copy/paste or drag fields within the editor.

HTML formatting

-  **DO: Limit formatting.** Use the available editing icons to handle things like bold, underline, italics and simple lists within your templates, but keep your readers in mind who may have only plain text.
-  **DO: Use the HTML source edit mode to add or paste additional HTML.** If additional formatting is needed, the message template editor allows you to add and edit HTML code into the template. You must be in source edit for the message template editor to interpret your input as HTML code.

Click the source edit icon  in the far right corner of the text box to toggle between source edit and normal editing mode. You can use this plain text document to copy/paste some Common HTML codes: [BasicHTML.txt](#).

For a complete list of HTML tags, reference <http://www.w3schools.com/tags/default.asp>

-  **DON'T: Include HTML document level tags before pasting HTML.** Don't include tags like <XML><DOCTYPE>, <HTML>, <BODY>. Strip out references to external style sheets (CSS files). These items may prevent your message from rendering properly or at all.

Bulleted lists



DO: Use the simplest list possible to convey your meaning. It is a best practice to assume readers may not have a rich text or HTML viewer. Consider using * or – to prefix each item in a list vs. relying on the email client to render a bulleted list. See examples below.

Use this	Rather than this
Things to bring with you: * Academic Plan * Upcoming term registration	Things to bring with you: <ul style="list-style-type: none">• Academic Plan• Upcoming term registration
West Campus -Suite 144 of the Student Center -email: mwagner@excellentu.edu -703-555-1212 South Campus -Room 222 Whitman Building -email: lm McIntyre@excellentu.edu -888-555-1212	<ul style="list-style-type: none">• West Campus<ul style="list-style-type: none">○ Suite 144 of the Student Center○ email: mwagner@excellentu.edu○ 703-555-1212• South Campus<ul style="list-style-type: none">○ Room 222 Whitman Building○ email: lm McIntyre@excellentu.edu○ 888-555-1212

Images



DO: Use images sparingly and limit size. A well selected image can be an important branding element for your email. But depending on email client settings and download speeds, images may just show up as broken or blank. No one wants to wait five minutes for a cool logo to download.



DO: Give your image both a defined size and an <alt> tag. You can resize an image in the editor by dragging the corners, or you can edit the height/width properties using the HTML source editor. To include an <alt> tag use the HTML source edit mode to add the tag, or paste an tag that includes the **alt** property.

For example :

```

```



DON'T: Convey information that cannot be found in text. You should not use an image to convey information that is not available by other means. Many email clients block images, so the message should make sense with or without the image.

Document Version History

Version	Description of updates	Date of update
1.0	Created with release of Message Template Editor feature for Starfish 4.6	6/20/14