Contingent Talent Management

CTM Alerts Features

Overview

CTM provides configurable alerts at several levels. These include system level alerts, region level alerts, and alerts for individual CTM Users who need to be notified when certain activities or events occur on the CTM Platform.

System Level Alerts for Workforce Portal

Administrators can configure various system level alerts for Workforce Portal at Admin > Workforce Portal Settings. For Email Group alerts, a single email address should be used in these areas. We recommend creating an internal distribution email group with your IT department or email account administrator for these types of alerts, such as hr@yourcompanyname.com or compliance@yourcompanyname.com.

System Level Alert Examples

- Notify a 'new applicants' email group when Workforce Portal applications are started or completed:
    - CTM Admin Tab > Workforce Portal Settings > Application > **Application Notification Email**
        - **Add a single email address here for your 'new applicant' email distribution group, such as 'newapplicants@yourcompanyname.com'**
- Notify the HR department when an Active Temp changes their name or contact info in Workforce Portal:
    - CTM Admin Tab > Workforce Portal Settings > Notifications > **Temp Information Change Notification**
        - **Add a single email address here for your 'HR' email distribution group, such as 'hr@yourcompanyname.com'**

Region Level Alerts for Workforce Portal

Administrators can subscribe an email address to receive alerts for all Workforce Portal activity in a given region at Admin > Regions. A single email address should be used in this area. We recommend creating an internal distribution email group with your IT department or email account administrator for these types of alerts, such as branchoffice@yourcompanyname.com.

Subscribe email to Workforce Portal Activity for a CTM Region

- CTM Admin Tab > Regions
- Find the Region where Workforce Portal activity is occurring and click **Edit**
- Select the Email tab
- Add a single email address here for the email distribution group, such as **'branchoffice@yourcompanyname.com'**
- Choose **Subscribe Email to Workforce Portal Activity**
- **Save** the changes

User Alerts

Alert Relationship Criteria

For CTM Staffing users to receive an alert concerning Temps and Clients, the user must have a relationship with the entity in CTM.

- For Client alerts, the CTM Staffing user must be associated as the Client's Sales Rep/Acct Manager, Staffing Specialist or Billing Specialist in the CTM Client Profile.
- For Temp alerts the CTM Staffing user must be associated as the Temp's Recruiter, Staffing Specialist or Compliance Manager in the CTM Temp Profile
- For Shift Alerts, the CTM Staffing user must be associated with either the Temp or Client associated to the order.

CTM Event Locations

Events occur in multiple places on the CTM Platform and CTM Staffing users have control to choose the locations they need to receive alerts from. The following are examples of locations where events can occur:

- **Workforce Portal**: Event occurs in Work Force Portal
  - Example: A Temp completes a Competency Test
- **ClearConnect**: Event occurs using our APIs, which generally mean it's an external integration partner performing an event in CTM.
  - Example: JobRobotix Creates a new Shift in CTM
- **Client Access**: Event occurs in Client Access
  - Example: Client Access user has Confirmed a Filled Shift
- **Staffing**: Event occurs in the CTM Application itself
  - A CTM User Reopened a Shift

Create a User Alert Subscription

To subscribe to User Alerts:

- Log into CTM
- At the top right, select the **USER ALERTS** link
- Choose Tab that contains the type of alert you want
  - Shifts: Activity concerning a shifts (orders)
  - Temp Profile Events: Activity concerning a Temp's Profile
  - Client Profile Events: Activity concerning a Client's Profile
  - Temp Credential Events: Activity concerning a Temp's Credentials
- Within the Tab chosen, find the Event you wish to receive notification and click on Edit. In this Example, we are setting a User Alert to be sent when a Temp completes a Competency Test.

Competency Test Completed   Edit

`Inactive` When a Competency Test is completed

- Next, choose the Event Occurrence Location. In this case this can only happen in Workforce Portal. Since Competency Test can only be completed in Workforce Portal, this is the only option.

Competency Test Completed User Alert

When a Competency Test is completed

From* | Workforce Portal

You'll receive an email when this occurs.

Cancel   Save

- Click Save
- The CTM development team adds new options for alerts regularly. Please read our monthly release notes as they appear in the popup of your login.