



RelianSys®
Transforming Governance

FAQ - Types of Email Reminders

Types of Email Reminders

RelianSys® Governance Suite has many types of email reminders that you can set up. They are all summarised below. This is also explained in various places in the User Manual and Help Screens.

MODULE	ALERT TYPE	WHEN IT IS SENT
All	Initial User Setup	Users are automatically advised of their login details when set up in the system. This is a once-only email advice.
Compliance	Obligation First/Next Due Date	The email notifications go out every day, depending on the dates. Weekly until actioned.
Audit	Audit Due Date	The email notifications go out every day, depending on the dates. Weekly until actioned.
Audit Compliance Risk	CAR or Task	The same notification process applies when a Follow-up Date and Responsibility are allocated. In this case, the email notification is sent instantly upon changes made. The email notifications go out every day, depending on the dates. Weekly until actioned.
Compliance Risk	MAP-action (refers to the Time Frame/Due Date in the project plan-level MAP - Action Plan)	The email notifications go out every day, depending on the dates. Weekly until actioned. After that date, you get weekly "MAP-action" reminders.
Compliance Risk	MAPa-review (short for MAP Action Review) refers to the Time Frame/Due Date in the individual MAP - Action Plan reports	This is actioned for the time interval between the initial Raised Date and the Time Frame/Due Date, according to the Review Period, which is manually selected if required by the person who is designated for that MAP-action (effectively the request to be reminded at selected periods leading up to the Time Frame/Due Date). They stop once the due date has been reached.
Compliance	Subscribed Obligation Changes	When an Obligation in a Subscribed Register is changed, any User who has been allocated Responsibility for that Obligation is automatically emailed to let them know it has changed. They are directed to the Obligation Changed Report to review the changed obligation. NOTE – when a Subscribed Obligation has been updated and saved as 'Minor Change', NO email alert is issued.
Audit Compliance Risk	Escalation to Managers	If the escalation function has been set up, emails are sent weekly to the designated manager once a Compliance Obligation, CAR, or MAP action is 14 days or more overdue.

MODULE	ALERT TYPE	WHEN IT IS SENT	
Audit Compliance Incident Risk	CARs/Tasks, MAPs & Incidents	These can also be manually sent to selected people if and when required.	
Delegation	Delegation Register Changes alert to Administrators	When a Provision in a subscribed Delegation Register changes, the Administrators receive an email alert.	
Delegation	Authority alert	When a Delegate has been associated with a Provision and sent for approval, the Approver receives an email each day that it is done.	
Delegation	New Subscribed or Internal Instruments	<ul style="list-style-type: none"> • When a new subscribed Instrument is subscribed to the customer. • When a new Internal Instrument is added. 	
Delegation	New, Changed and Deleted Provisions for Subscribed & Internal Instruments	<ul style="list-style-type: none"> • When new, changed, or deleted provisions in a subscribed instrument are published by the sysadmin, they appear in the Updates tab. • When there are new, changed, or deleted provisions in an internal instrument published by an administrator, that appear in the Updates tab. 	
Delegations+	New Subscribed or Internal Provisions	<ul style="list-style-type: none"> • When a new subscribed Instrument is subscribed to the customer. • When a new Internal Instrument is added. 	
Delegations+	New, Changed and Deleted Provisions for Subscribed & Internal Instruments	<ul style="list-style-type: none"> • When new, changed, or deleted provisions in a subscribed instrument are published by the sysadmin, they appear in the Updates tab. • When there are new, changed, or deleted provisions in an internal instrument published by an administrator, that appear in the Updates tab. 	
Delegations+	Send to All the Approvers at Once	Send for approval	When the provisions are sent for approval with the mentioned approval process selected.
		One or more provisions were rejected.	When one of the approvers rejects one or more provisions, those rejected provisions are sent to the person selected for changes.
		Provisions are approved	When all the approvers approve one or more provisions.

MODULE	ALERT TYPE	WHEN IT IS SENT	
Delegations+	Send by Order	Send for approval	When the provisions are sent for approval with the mentioned approval process selected.
		Next Approver	When the previous Approver approves all the provisions, these are sent to the next Approver selected until all approvers have approved.
		One or more provisions were rejected.	When one of the approvers rejects one or more provisions, those rejected provisions are sent to the person selected for changes.
		Provisions are approved	When all the approvers approve one or more provisions.
Delegations+	Approver selects the next Approver	Send for approval	When the provisions are sent for approval with the mentioned approval process selected.
		Next Approver	When all the provisions are approved, these are sent to the next Approver selected.
		One or more provisions were rejected.	When one of the approvers rejects one or more provisions, those rejected provisions are sent to the person selected for changes.
		Provisions are approved	When all the approvers approve one or more provisions.
Delegations+	Assigned Provisions	When one or more provisions are assigned to a delegate.	
Delegations+	Changes in the assigned Provisions	When there are any changes in the provisions assigned to the delegate.	
Incident	Manager notification	When an incident is first entered, it is allocated to a Manager, and others can be cc'd into the Incident. They all receive a notification email that the Incident has been raised.	
Incident	Manager review	When an Incident is allocated to a Manager, they receive a weekly alert until it is Concluded.	
Authorisations	Authorisation alert to Administrators	When changes to a subscribed Instrument of Authorisation have been published.	

MODULE	ALERT TYPE	WHEN IT IS SENT	
Monitor	Records	Record Due Date Set	<p>Email notification sent out to the responsible person:</p> <ul style="list-style-type: none"> • Four weeks before the due date. • Two weeks before the due date.
		Due Soon	Email notification is sent to the responsible person one week before the due date.
		Due Today	Email notification is sent out to the responsible person on the due date.
		Overdue	Email notification is sent to the responsible person weekly if overdue after the due date.
		Remind Me	A reminder email notification is sent to the responsible person depending on the selected option in the 'Remind Me' field inside a Record.
		Responsibility	Email notifications to users when they are assigned to a Record.
Monitor	Tasks	Task Due Date Set	<p>Email notification sent out to the responsible person:</p> <ul style="list-style-type: none"> • Four weeks before the due date. • Two weeks before the due date.
		Due Soon	Email notification is sent to the responsible person one week before the due date.
		Due Today	Email notification is sent out to the responsible person on the due date.
		Overdue	Email notification is sent to the responsible person weekly if overdue after the due date.
		Remind Me	A reminder email notification is sent to the responsible person depending on the selected option in the 'Remind Me' field inside a Task.
		Responsibility	Email notifications to users when they are assigned to a Task.

MODULE	ALERT TYPE	WHEN IT IS SENT
Risk	Risk Created/ Assigned	When a Risk is created and assigned a Risk Owner.
Risk	Risk Updated	Updates for each day shall be recorded in Risk Updated Email and sent to Risk Owner once a day at 5:00PM AEST. If Risk Owner has made any changes, then Risk Owner shall not receive an email regarding changes made.
Risk	Risk Reminder	On the date set as the Remind Me date.
Risk	Due Soon	<ul style="list-style-type: none"> • Four weeks before the due date. • Two weeks before the due date. • One week before the due date. • A day before the due date.
Risk	Due Today	On the day of the due date when the Risk is due.
Risk	Overdue	On the day the Risk becomes overdue (i.e., the day after the due date) and weekly after that until actioned.
Risk	Overdue Escalation	On the day the Risk becomes overdue, i.e., the day after the due date and weekly after that until actioned.
Risk	Risk Review Assigned	When reviewers are assigned to the Risk in the Review Stage.
Risk	Risk Reviewed	When assigned Risk Reviewer Reviews the Risk in the Review Section.
Risk	Risk Review Date	<ul style="list-style-type: none"> • Four weeks before the review date • Two weeks before the review date • One week before the review date • A day before the review date • On the review date
Risk	Task Created	When a Task is created in a Risk.
Risk	Task Assigned	When a Task is assigned to a User.
Risk	Task Approval	When the Task is assigned an Authoriser/approver in the Investigate stage.
Risk	Task Approved	When the Task is approved by the Approver/authoriser in the Investigate stage.
Risk	Task Rejection	When the Task is rejected by the Approver/authoriser in the Investigate stage.
Risk	Task Review	When the Task is assigned an Authoriser/approver in the Investigate stage.

MODULE	ALERT TYPE	WHEN IT IS SENT
Risk	Task Review Approved	When the Task is approved by the reviewer in the Implement stage.
Risk	Task Review Rejection	When the Task is rejected by the Approver/authoriser in the Investigate stage.
Risk	Task Due Soon	<ul style="list-style-type: none"> • Four weeks before the due date • Two weeks before the due date • One week before the due date • A day before the due date
Risk	Task Due Today	On the day of the due date when the Task is due.
Risk	Task Overdue	On the day the Task becomes overdue, i.e., the day after the due date and weekly after that until actioned.
Risk	MAP Created	When a MAP is created in a Risk.
Risk	MAP Assigned	When a MAP is assigned to a User.
Risk	MAP Due Soon	<ul style="list-style-type: none"> • Four weeks before the finish date. • Two weeks before the finish date. • One week before the finish date. • A day before the finish date.
Risk	MAP Due Today	On the day of the finish date when the MAP is due.
Risk	MAP Overdue	On the day the MAP passes the finish date, i.e., the day after the finish date and weekly after that until actioned.
Risk	MAP- action plan (MAPa)	When a MAPa is created in a Risk.
Risk	MAPa Assigned	When a MAPa is assigned to a User.
Risk	MAPa Due Soon	<ul style="list-style-type: none"> • Four weeks before the Time Frame/Due Date. • Two weeks before the Time Frame/Due Date. • One week before the Time Frame/Due Date. • A day before Time Frame/Due Date.
Risk	MAPa Due Today	On the day of the Time Frame/Due Date when the MAPa is due.
Risk	MAPa Overdue	On the day the MAPa passes the Time Frame/Due Date, i.e., the day after the Time Frame/Due Date and weekly after that until actioned.
Risk	Analysis Tool added	When an Analysis Tool is added to the Risk.

COMPONENT	ALERT TYPE	WHEN IT IS SENT	
Corporate Planning	Level 3 (OPERATIONAL PLAN)	Level 3 Created/ Assigned	When Level 3 is created and assigned a Responsible Person.
		Level 3 Updated	<ul style="list-style-type: none"> If any changes have been recorded in a Level 3, an update email shall be sent to the Responsible Person when changes are saved. If the Responsible Person has made any changes, then the Responsible Person shall not receive an email regarding changes made by the Responsible Person.
		Review Cycle	At the end of the review cycle. The Record's first day shall be counted from the 1st day of the financial year, the 1st of July of every year. If the review cycle is set to yearly, the reminder would be sent on the 25th of June every year (5 days before the end of the 'Yearly' Period. Similarly, if it is set to Quarterly, it will be sent five days before the end of the quarter.
Corporate Planning	Level 4 (ACTION PLAN)	Responsible Person	5 Days before the end of the reporting period.
		User(s) selected	Immediately upon clicking the Send button.
		Due Today	On the day of the due date.
		Overdue	On the day the Performance Measure becomes overdue (i.e., the day after the due date) and weekly after that until actioned.
		Overdue Escalation	On the day the Performance Measure becomes overdue, i.e., the day after the due date and weekly after that until actioned.
Corporate Planning	Level 6 (TASK)	Task Created	When a Task is created, a Risk.
		Task Assigned	When a Task is assigned to a User.
		Task Due Soon	<ul style="list-style-type: none"> Four weeks before the due date. Two weeks before the due date. One week before the due date. <p>A day before the due date.</p>
		Task Due Today	On the day of the due date when the Task is due.
		Task Overdue	On the day the Task becomes overdue, i.e., the day after the due date and weekly after that until actioned.
		Task Overdue Escalation	On the day Performance Measure becomes overdue, i.e., the day after the due date and weekly after that until actioned.

COMPONENT	ALERT TYPE	WHEN IT IS SENT	
Corporate Planning	APPROVAL PROCESS Send to All Approvers at Once	Send for Approval	When they are sent for approval with the mentioned approval process selected.
		One or more rejected	When one of the approvers rejects one or more Records, those rejected Records are sent to the person selected for changes.
		Records are approved	When all the approvers approve one or more Records.
Corporate Planning	APPROVAL PROCESS - Send by Order	Send for Approval	When the Records are sent for approval with the mentioned approval process selected.
		Next Approver	When the previous Approver approves all the Records, these are sent to the next Approver selected until all approvers have approved.
		One or more Records were rejected.	When one of the approvers rejects one or more Records, those rejected Records are sent to the person selected for changes.
		Records are approved	When all the approvers approve one or more Records.
Corporate Planning	APPROVAL PROCESS Approver selects the next Approver	Send for Approval	When the Records are sent for approval with the mentioned approval process selected.
		Next Approver	When all the Records are approved, these are sent to the next Approver selected.
		One or more Records were rejected.	When one of the approvers rejects one or more Records, those rejected Records are sent to the person selected for changes.
		Records are approved	When all the approvers approve one or more Records.