Using Automatic Notifications to Track To-Do and Certification Progress

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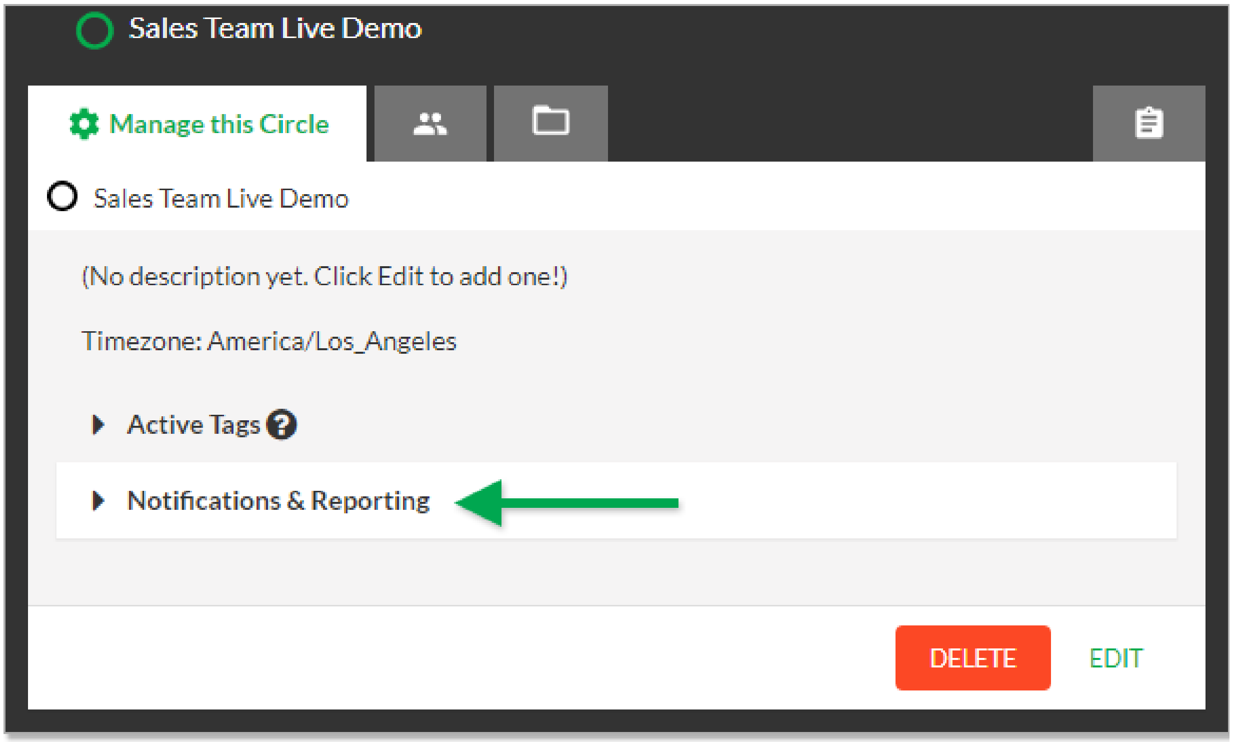
To **track user To-Do** and **certification** progress without manually running a report, Veelo's automatic notification options will **email** you and other managers with your team's information. There are two types of notifications you can opt in for:

1. **Real-time manager notifications**, which are emailed you and other Veelo managers as soon as a user meets certain criteria, e.g., earned a certificate, or failed an exam.
2. **Summary reports** that include what your users have completed at specific intervals, e.g., weekly, or monthly.

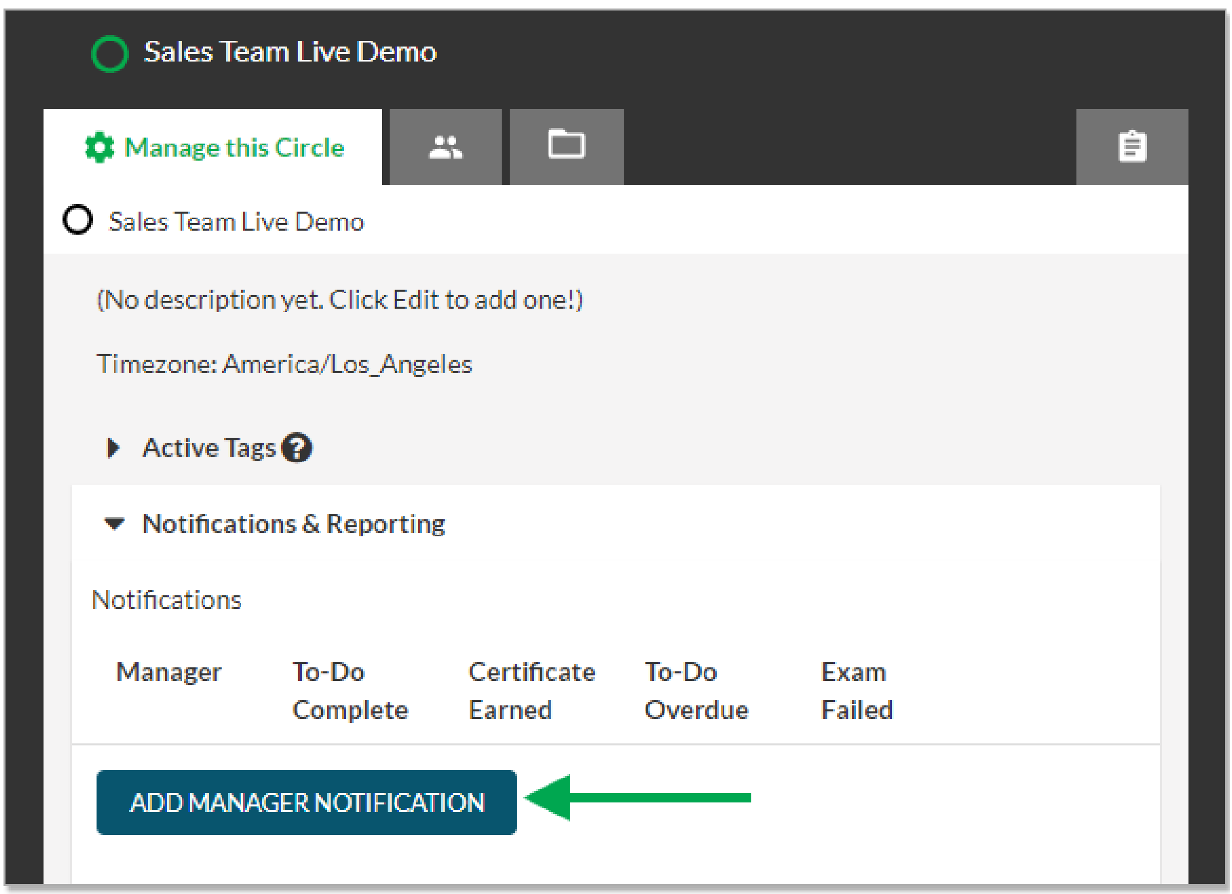
This article will walk through the basic process of setting up these notifications, as well as provide an overview of the notifications and reports.

Real-Time Manager Notifications

1. To set up real-time email notifications that trigger upon users satisfying specific criteria, go to the **Management Controls** area, and click on the **Circle** you wish to receive notifications for. Once in the, click on the **Manage This Circle** tab, and expand the **Notifications & Reporting** area.



2. In the **Notifications** area, click on the **Add Manager Notification** button.

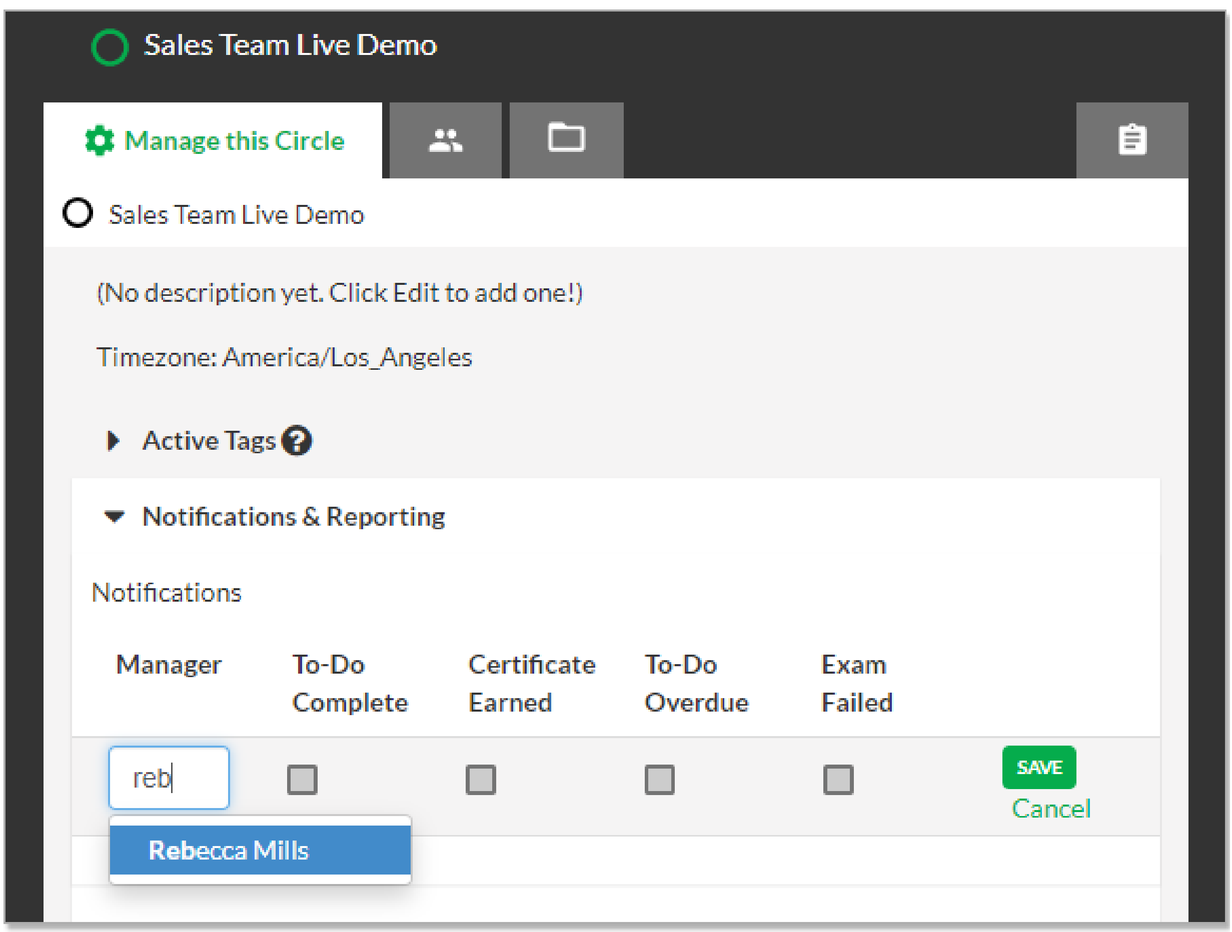


3. Enter the manager's name who should receive the notification in the **Manager** field, then check the different options. Click **Save** when done. These managers will receive email notifications when these conditions are met:

   To-Do Complete: When a user completes a To-Do.
   Certificate Earned: When a user earns a certificate.
   To-Do Overdue: When a user is overdue on a To-Do
   Exam Failed: When a user fails an exam

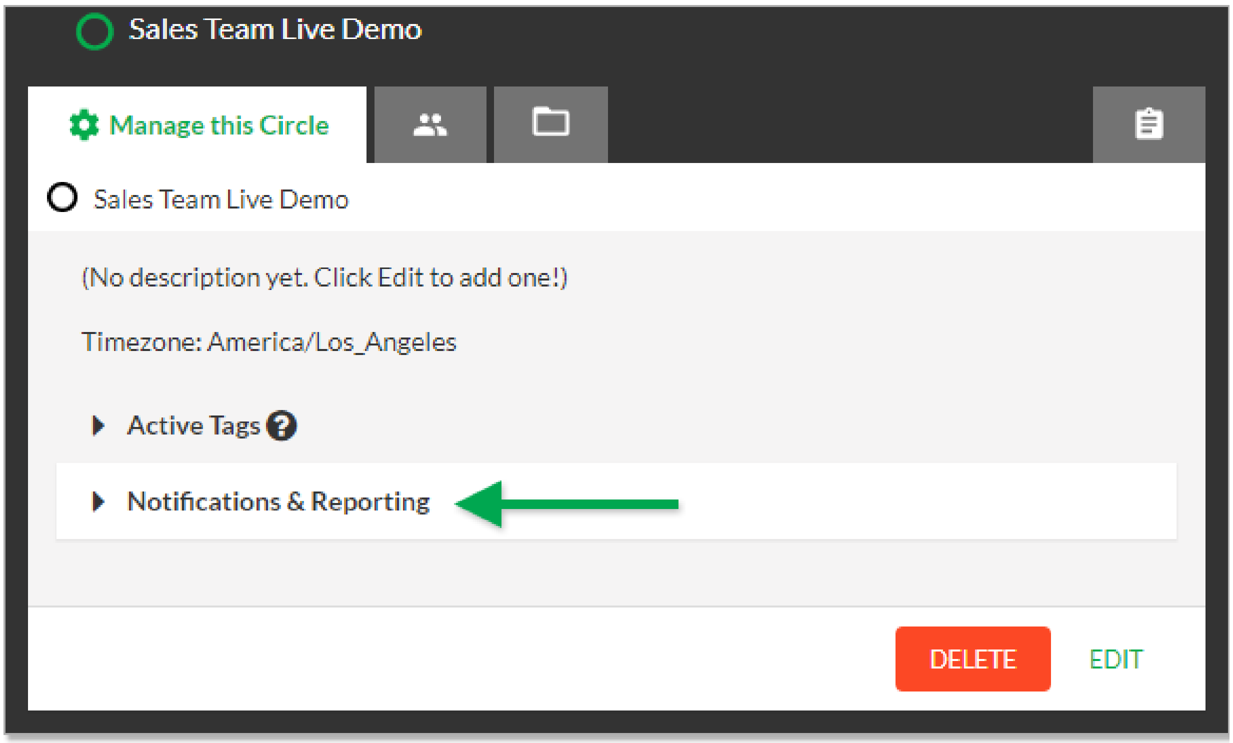
   NOTE: These email notifications will be sent per user, as soon as the criteria are met. There is currently no digest option.

   NOTE: In order for a user's name to show up in the **Manager** field, they must have manager permissions. For more information on how to provide manager permissions, see Managing User Permissions.

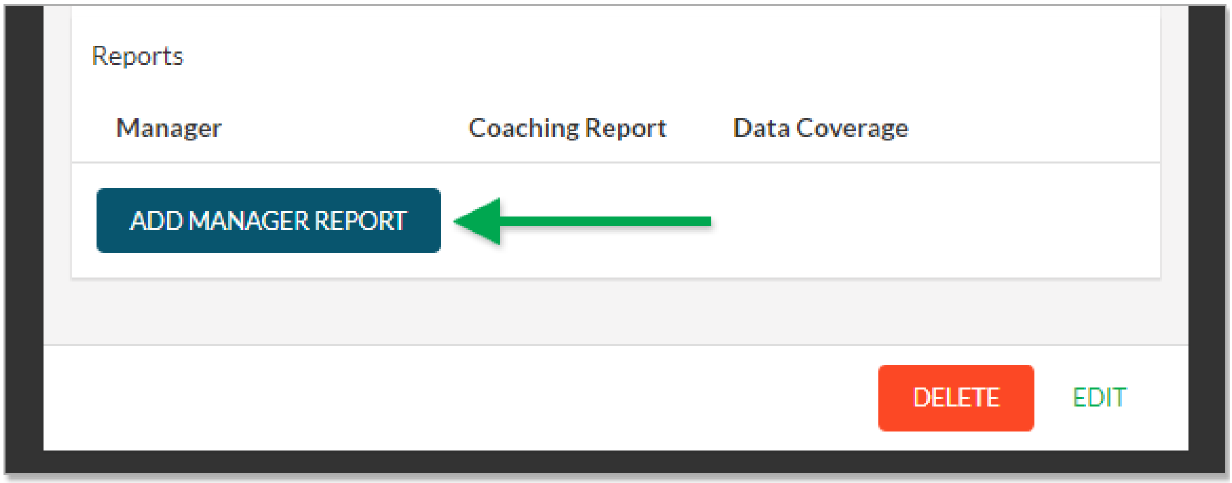


Summary Report Emails

1. To receive manager reports that summarize team performance in your selected Circle, go to the **Management Controls** area, and click on the **Circle** you wish to receive notifications for. Once in the, click on the **Manage This Circle** tab, and expand the **Notifications & Reporting** area.



2. In the **Reports** area, click on the **Add Manager Report** button.



3. Enter the manager's name in the **Manager** field, then choose a cadence for the **Coaching Report** and **Data Coverage** reports. Click **Save** when done.

   Coaching Report provides managers with an overview of your team's proficiency, overall To-Do completeness, and engagement over the selected time period. Choose from **weekly, bi-monthly, monthly,** and **quarterly** cadences.
   Data Coverage summarizes all activities per user by **week** or **month**.

   NOTE: In order for a user's name to show up in the **Manager** field, they must have manager permissions. For more information on how to provide manager permissions, see Managing User Permissions