

# Create a Message Template

Last Modified on 12/31/2018 3:49 pm EST

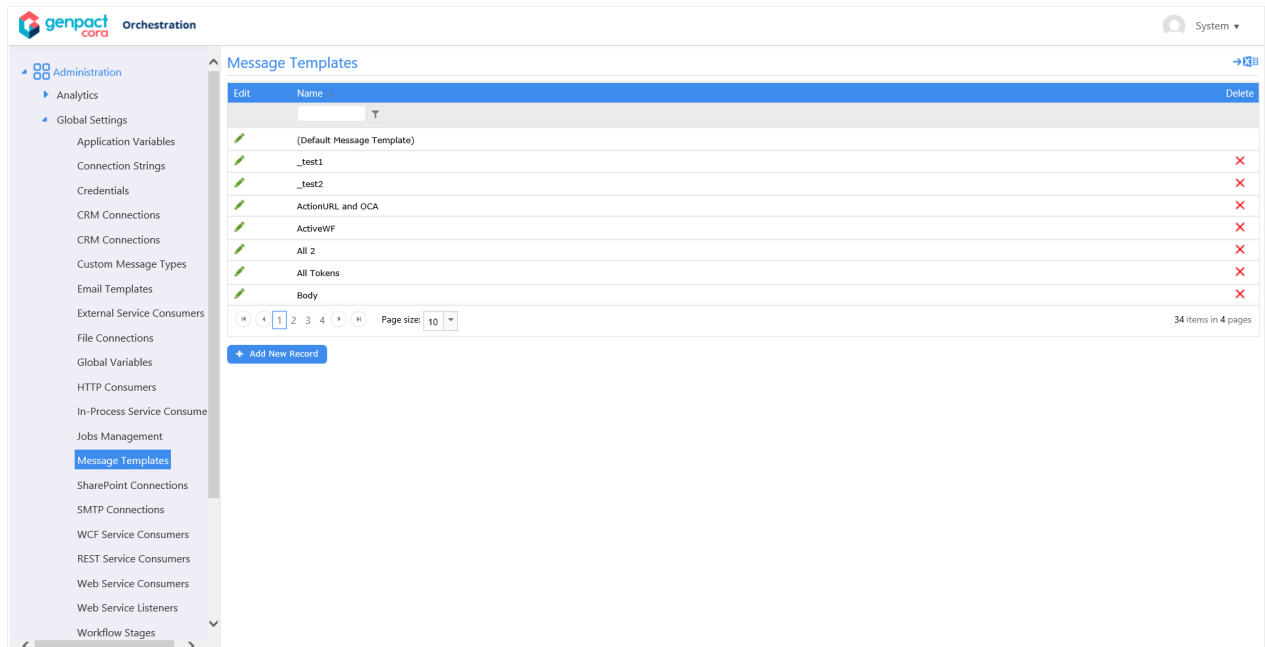
## V8.6 or earlier

### Overview

The message template is an HTML-based message that enables you to create reusable, dynamic messages. The template can include free text, HTML content, as well as message parameters. You select a message template and define the parameter values in the Message Activity wizard or the Task Activity wizard. The

### Message Template Table

You manage all message templates from the Message Template table. Navigate to **Administration > Global Settings > Message Templates**.

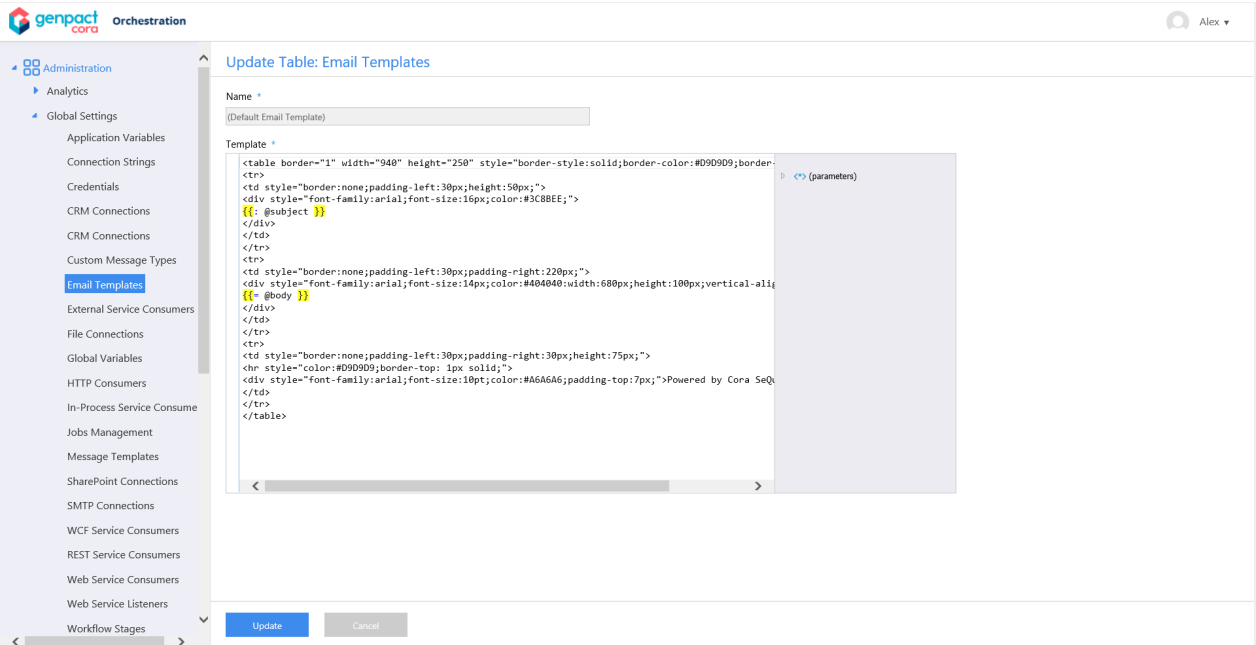


The screenshot shows the Genpact Orchestration interface. On the left is a navigation menu with 'Administration' expanded to show 'Global Settings' and 'Message Templates' selected. The main area displays a table of message templates. The table has columns for 'Edit', 'Name', and 'Delete'. The rows include: '(Default Message Template)', '\_test1', '\_test2', 'ActionURL and OCA', 'ActiveWF', 'All 2', 'All Tokens', and 'Body'. Each row has a green checkmark in the 'Edit' column and a red 'X' in the 'Delete' column. Below the table is a pagination control showing 'Page size: 10' and '34 items in 4 pages'. An 'Add New Record' button is located below the pagination.

Edit	Name	Delete
✓	(Default Message Template)	
✓	_test1	✗
✓	_test2	✗
✓	ActionURL and OCA	✗
✓	ActiveWF	✗
✓	All 2	✗
✓	All Tokens	✗
✓	Body	✗

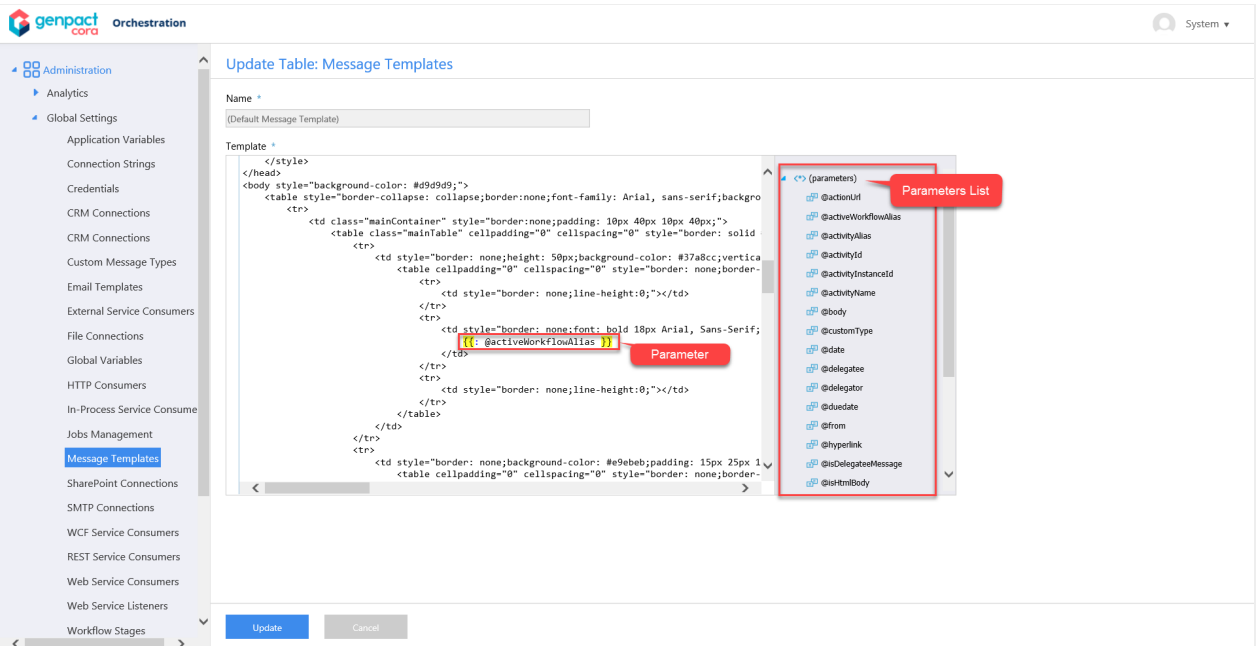
### Default Message Template

There is an out-of-the-box default message template that you can use, or you can copy the default template to use as the basis for a new message template.



## Message Template parameters

Message parameters are enclosed in double curly brackets, which are also highlighted in yellow. You select parameters from the right panel.



## Use a Message Template in the Message Activity or Task Activity

To use a message template in the Message Activity or Task Activity, you need to select an HTML message format, either **Html** or **Html (Markup only)**.

Following are message settings that affect the message template selection.

### Message Tab

Where you define the Subject, Body, Message Template, and message format.

## Message Details



Message Recipients Properties Attachments More Options

### Subject

{act.ActivityAlias} in process #{ wf.WorkflowInstanceld }

### Body

Rich text editor toolbar with options: Bold (B), Italic (I), Underline (U), abc, x<sub>1</sub>, x<sub>2</sub>, Font Name, Size, Cut, Copy, Paste, Undo, Redo, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Table of Contents, Print, and a menu icon.

This is message {act.ActivityAlias} in instance # { wf.WorkflowInstanceld } of { wf.WorkflowAlias } process

Design HTML

Message format

### Message Template

(Default Message Template)

Html

Calculate per Recipient

Back

Next

OK

Cancel

## Recipients Tab

The users you define as recipients are plugged in to the corresponding *@recipient* parameter in the message template.

## Message Details



**Message** Recipients Properties Attachments More Options

Condition (optional)  ...

Recipients List  ... Queue Mode  ▾ ✕

[+ Add distribution list](#)

Back

Next

OK

Cancel

### Properties Tab

## Message Details



Message Recipients **Properties** Attachments More Options

### Email Mode

None

### Task Due Date

Time Interval

Calculate From

Set Due Date by Working Time

Set Mail as High Priority Only if (optional)

Enable Reassigning Task

Enable Adding Recipients

Enable Removing Recipients

Customize Recipients Picker

Back

Next

OK

Cancel

## Important Notes

### HTML Encoding for Expressions

You can encode or unencode HTML content (such as form data, HTML forms, HTML controls, rich text editors) for expressions in the body section of a Message Activity or Task Activity.

To unencode the HTML content, you need to wrap the expression inside `{{= }}`, which evaluates the expression in HTML format. For example, `{{: {Form1}.Query("Form1")["Editor1"] }}`.

To encode the HTML content, you need to wrap the expression in `{{ }}`. For example, `{{={Form1}.Query("Form1")["Editor1"] }}`.

### Include HTML Content in the Message Template

Some characters used in expressions are also used in HTML. In order to maintain HTML content in a message, meaning that it is not evaluated as an expression, you need to wrap the content in `{{#text}} {{#endtext}}`.

## Use Encoded Attributes in HTML Tags

You can use an expression as an encoded attribute within an HTML tag. To use an expression as an encoded attribute, you need to wrap the expression in `{::}`. For example, `<a href={::@actionUrl}>`.

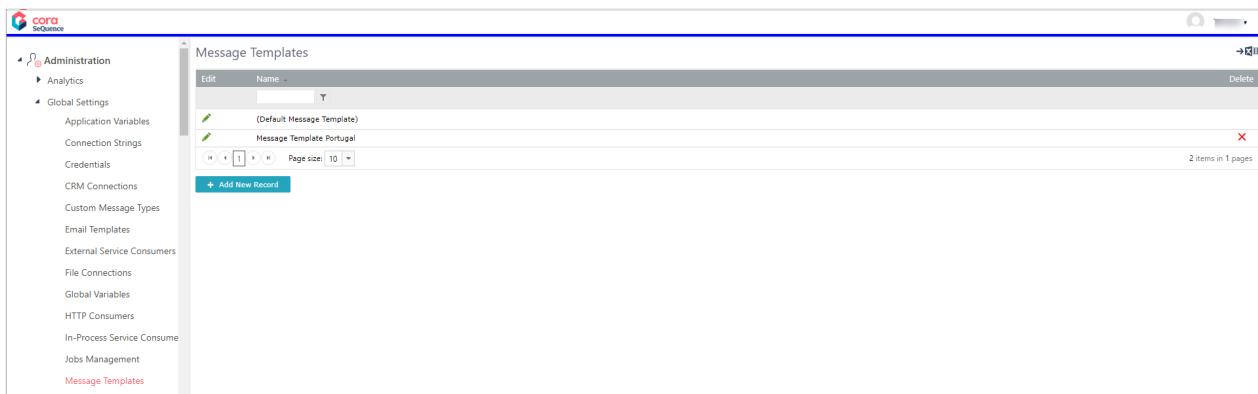
## V8.7 and later

### Overview

The message template is an HTML-based message that enables you to create reusable, dynamic messages. The template can include free text, HTML content, as well as message parameters. You select a message template and define the parameter values in the Message Activity wizard or the Task Activity wizard.

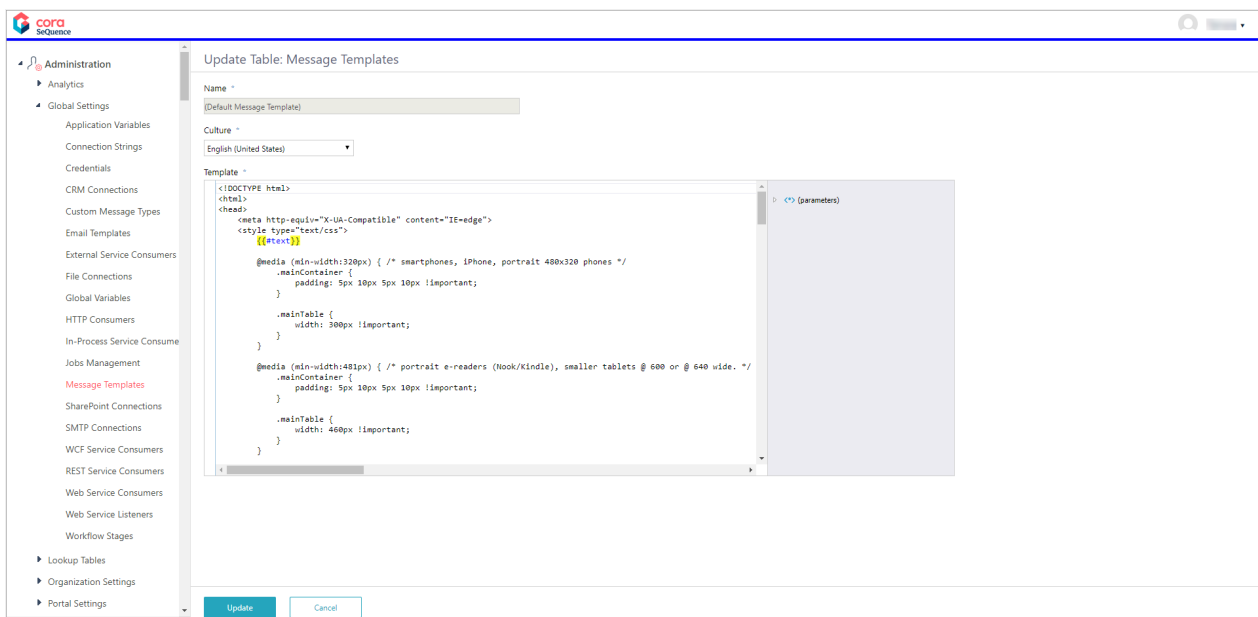
### Manage message templates

You manage message templates from the Message Templates page, at **Administration > Global Settings > Message Templates**.



## Default Message Template

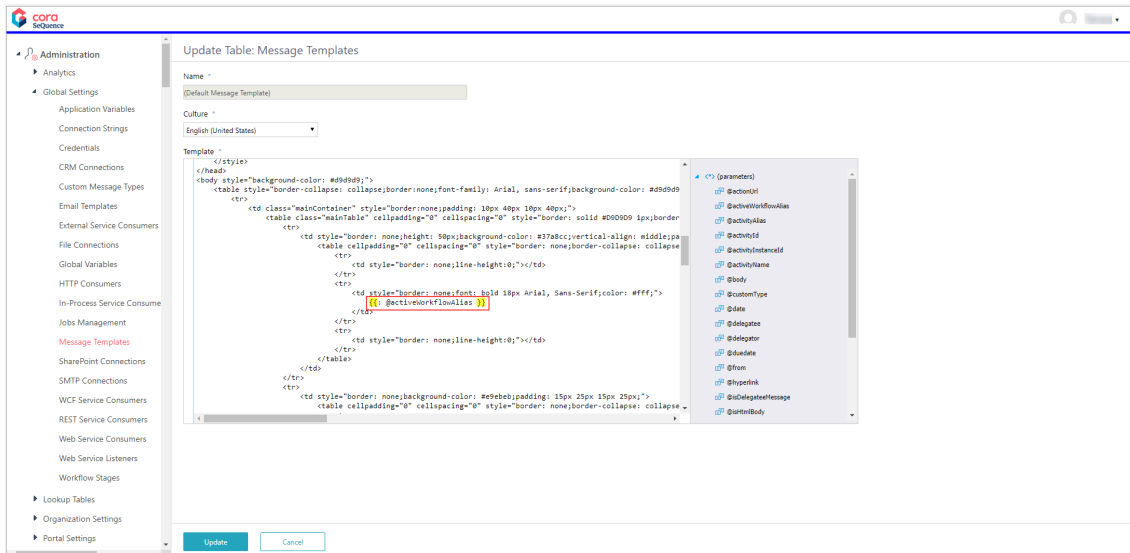
There is an out-of-the-box message template in each language supported by the system. You cannot delete the default template, but you can edit it according to your needs, or copy it to use it as a basis for new templates.



## Create a message template

1. To create a new message template, go to **Administration > Global Settings > Message Templates**, and select **Add New Record**.
2. Define the following settings:
  - **Name:** Enter a significant name for the message template. This is the name that displays in the list of available templates in the Message activity or Task activity wizard.
  - **Culture:** List of languages supported by Cora SeQuence. Select the relevant language for the template that you are creating.
  - **Template:**
    - Add the HTML code for your template. You can copy the provided default template and edit it for your needs.
    - Select parameters from the right panel. Message parameters are enclosed within double curly

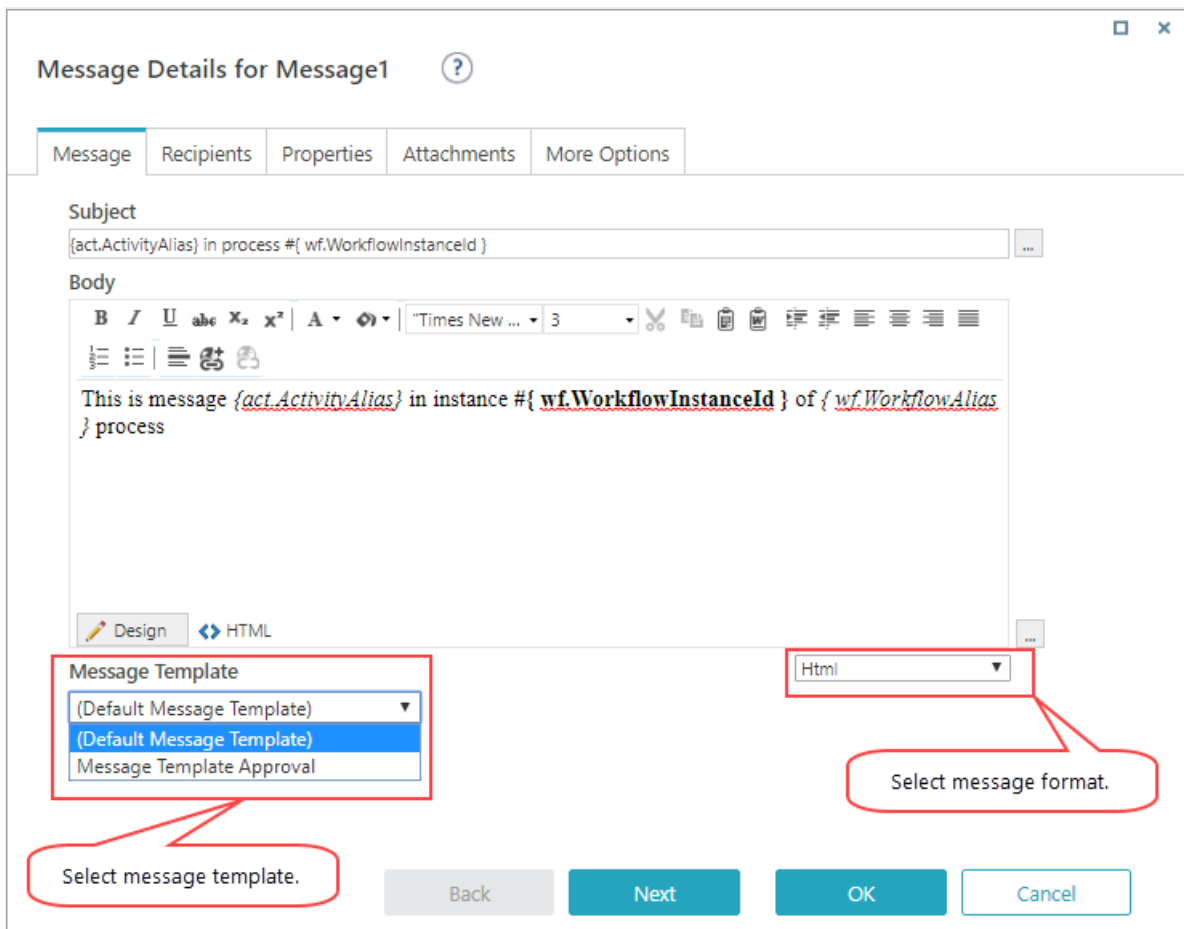
brackets, which are also highlighted in yellow.



The message templates that you create are available in the App Studio when you set up a Message activity or Task activity.

### Set up Message or Task activities with the relevant message template

1. On the **Message** tab, select the message template that is most relevant for the activity. The message template will define the look and feel of the sent message. Note that if you select the Plain Text style format, your message loses the design definitions of the message template.



2. The values you define as recipients are plugged in to the corresponding `@recipient` parameter in



the message template.

The screenshot shows a dialog box titled "Message Details for Message1" with a help icon. It has five tabs: "Message", "Recipients", "Properties", "Attachments", and "More Options". The "Recipients" tab is active. At the top, there is a "Condition (optional)" field with a dropdown arrow and a "Queue Mode" dropdown set to "Default". A "Delete List" button with a red 'X' icon is on the right. Below this is a table with columns: "Type", "Recipient", "Role", "Hierarchy", and two empty columns. The table contains one row: "Employee Role", "Team Leader", "Manager", "Direct", a green pencil icon, and a red 'X' icon. Below the table is an "Add Recipient" button with a dropdown arrow. At the bottom left, there is a "+ Add Distribution List" link. At the bottom right, there are four buttons: "Back", "Next", "OK", and "Cancel".

Type	Recipient	Role	Hierarchy		
Employee Role	Team Leader	Manager	Direct		

Recipient selection determines the language used for the selected message template, as follows:

- For Group, Group Expression, User, User Expression, Process Role, Employee Role:
  - First the system looks for the language defined for the recipient.
  - If it does not find a definition, it looks for the default English (United States) template.
  - If it doesn't find it, it uses the template defined for the first language in the Culture list.
- For External User, the system uses the default English (United States) template.

3. On the **More Options** tab, select a localization mode:

- **Default:** system uses the message template that matches the system's default culture (language).
- **Inherited:** system uses the language defined for the workflow.
- **Recipient:** system uses the culture of the message's recipient. This is the recommended option if you want to match the message template with the language defined to each recipient.

**Message Details** ?
□ ×

Message

Recipients

Properties

Attachments

More Options

**Sender Mode**

System Default ▾

Send Email with Custom Email Header ...

**Email Hyperlink**

...

**Localization Mode**  
Mode of language and other localized formatting

Default ▾

Default

Inherited

Recipient

Back

Next

Finish

Cancel

## Notes

### HTML encoding for expressions

You can encode or unencode HTML content (such as form data, HTML forms, HTML controls, rich text editors) for expressions in the body section of a Message Activity or Task Activity.

- To unencode the HTML content, you need to wrap the expression inside `{{= }}`, which evaluates the expression in HTML format.  
For example, `{{: {Form1}.Query("Form1") ["Editor1"] }}`.
- To encode the HTML content, you need to wrap the expression in `{{: }}`.  
For example, `{{= {Form1}.Query("Form1") ["Editor1"] }}`.

### Include HTML content in the Message Template

Some characters used in expressions are also used in HTML. To ensure that the HTML content is not evaluated as an expression, you need to wrap the content in `{{#text}} {{#endtext}}`.

### Use encoded attributes in HTML tags

You can use an expression as an encoded attribute within an HTML tag. To use an expression as an encoded attribute, you need to wrap the expression in `{{:: }}`.  
For example, `<input type="text" value="{{:: {Form1}.Query("Form1") ["Editor1"] }}" />`.

- Administration
  - Analytics
  - Global Settings
    - Application Variables
    - Connection Strings
    - Credentials
    - CRM Connections
    - Custom Message Types
    - Email Templates
    - External Service Consumers
    - File Connections
    - Global Variables
    - HTTP Consumers
    - In-Process Service Consumer
    - Jobs Management
    - Message Templates**
    - SharePoint Connections
    - SMTP Connections
    - WCF Service Consumers
    - REST Service Consumers
    - Web Service Consumers
    - Web Service Listeners
    - Workflow Stages
  - Lookup Tables
  - Organization Settings
  - Portal Settings
  - Security
- Solutions
- Workflows

### Update Table: Message Templates

Name \*  
Message Template Portugal

Culture \*  
English (United States)

```
Template *
<tr>
  <td valign="top" style="border: none;font: bold 14px Arial, Sans-Serif;width: 18%;padding:
  <td valign="top" style="border: none;font: 14px Arial, Sans-Serif;vertical-align: top;padding:
  <td style="border: none;vertical-align: top;padding: 0 0 5px 0;"
  <a href="[[::@actionURL]]" style="font: 14px Arial, Sans-Serif;color: #33
  </td>
  <tr>
  <td style="border: none;vertical-align: top;padding: 5px 0 5px 0;"
  <a href="[[::@hyperlink]]" style="font: 14px Arial, Sans-Serif;color: #33
  </td>
  </tr>
</table>
</tr>
```

<? (parameters)

Update Cancel