

## Research Outputs – Batch Email

This guide shows Publications staff how to send batch emails to a personnel group within Research Master.


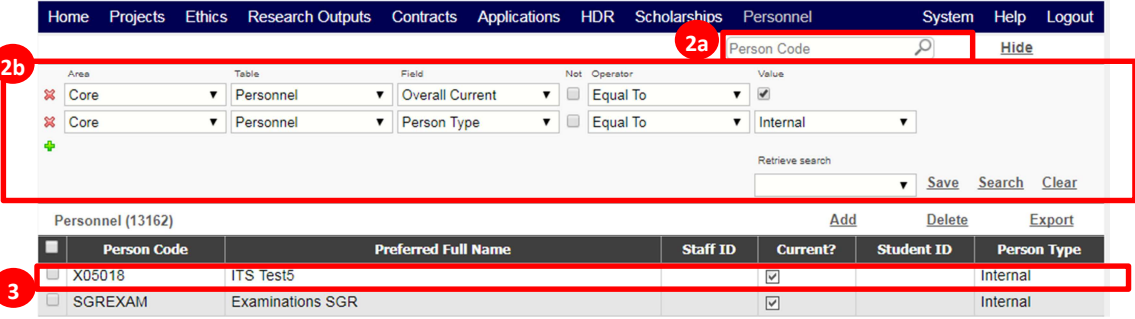


### Guidelines and rules

- A Research Master login is required to complete this task.
- Access to the networked shared drive

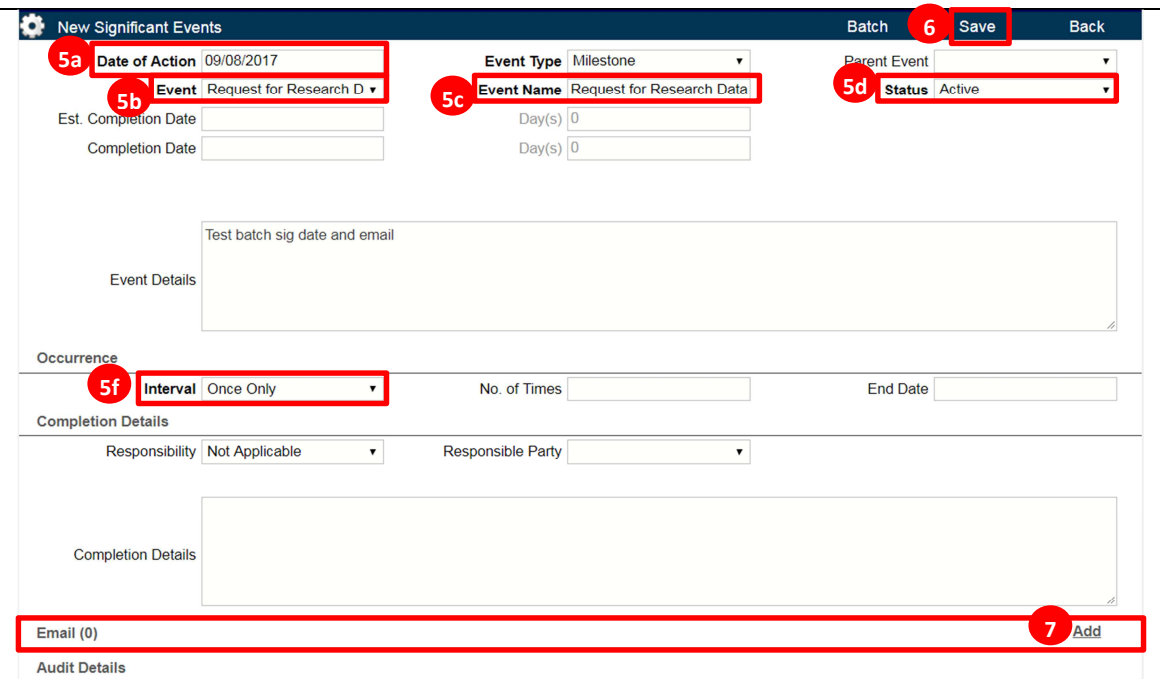
### Exclusions

- Saving changes to templates in the shared directory

### Enter Research Output – Batch Email

<p>1. Mouse over <b>Personnel</b> from the top menu and then select <b>Personnel</b> again from the drop down menu. This will display the Personnel module.</p>																																									
<p>2. Search for your own personnel record to create a sample/test significant date email.</p> <ol style="list-style-type: none"> <li>Use the <b>Basic</b> search field by entering the <b>Person Code</b> and click Search</li> <li>Use the <b>Advanced</b> search fields to extend your search criteria.</li> </ol>	 <table border="1"> <thead> <tr> <th colspan="7">Personnel (13162)</th> <th>Add</th> <th>Delete</th> <th>Export</th> </tr> <tr> <th><input type="checkbox"/></th> <th>Person Code</th> <th>Preferred Full Name</th> <th>Staff ID</th> <th>Current?</th> <th>Student ID</th> <th>Person Type</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>X05018</td> <td>ITS Test5</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>Internal</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>SGREXAM</td> <td>Examinations SGR</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>Internal</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Personnel (13162)							Add	Delete	Export	<input type="checkbox"/>	Person Code	Preferred Full Name	Staff ID	Current?	Student ID	Person Type				<input type="checkbox"/>	X05018	ITS Test5		<input checked="" type="checkbox"/>		Internal				<input type="checkbox"/>	SGREXAM	Examinations SGR		<input checked="" type="checkbox"/>		Internal			
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<p>3. Select the personnel you want, by clicking on the row</p>																																									
<p>4. Go to the <b>Significant Events</b> subsection and click on it or click the <b>Add</b> link. This will display the Significant Dates subsection form</p>	 <table border="1"> <tr> <td>Contact Details (1)</td> <td>Add</td> <td>Delete</td> <td>Export</td> </tr> <tr> <td>Significant Events (1)</td> <td>Add</td> <td>Delete</td> <td>Export</td> </tr> <tr> <td>Campus (0)</td> <td></td> <td></td> <td>Add</td> </tr> </table>	Contact Details (1)	Add	Delete	Export	Significant Events (1)	Add	Delete	Export	Campus (0)			Add																												
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5. Enter the details for the significant date. Ensure it is 100% accurate before proceeding to the next steps.
  - a. Enter the **Date of Action** by clicking in the field and selecting the date using the date picker.
  - b. Select the event from the **Event** dropdown field. For example; 'Request for research data'
  - c. The **Event Name** will be pre-populated, but change it, if need be
  - d. Select 'Active' from the **Status** dropdown list
  - e. Enter further details in the **Event Details**
  - f. Select the frequency of the event from the **Interval** dropdown list
6. Click **Save** to save and display the Email related item subsection.
7. Scroll down to the **Email** subsection and click on it or click the **Add** link. This will display the Email subsection form

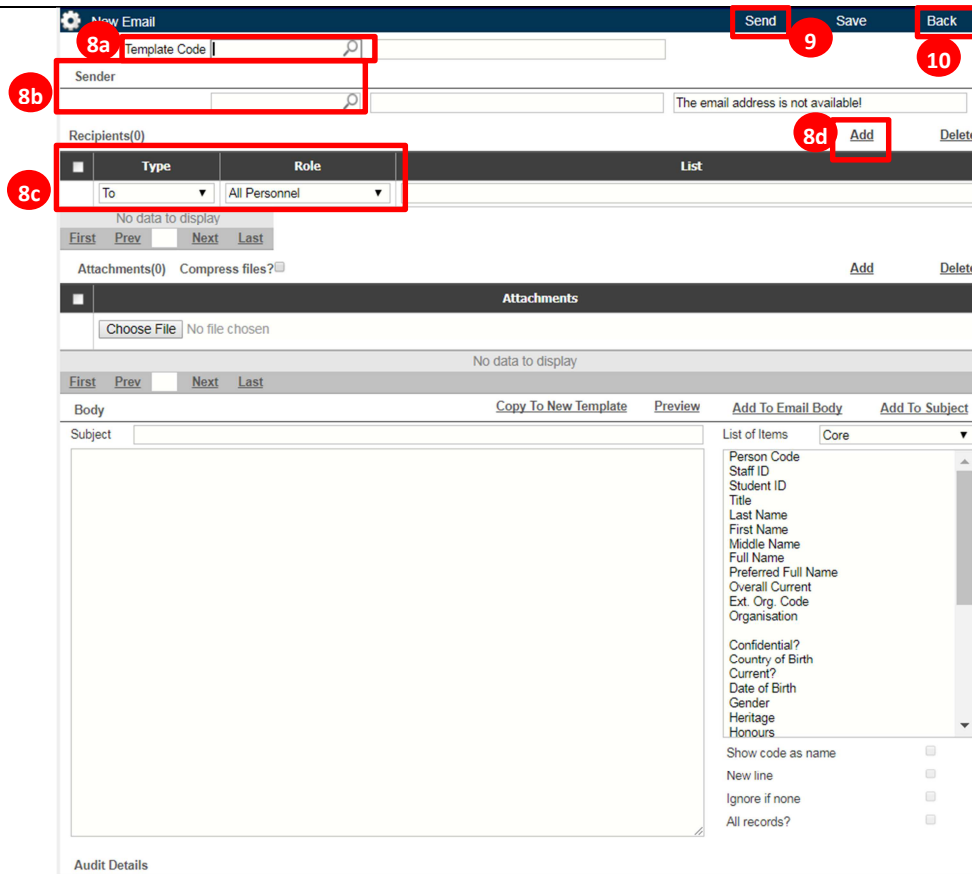


The screenshot shows the 'New Significant Events' form with the following fields and callouts:

- 5a** Date of Action: 09/08/2017
- 5b** Event: Request for Research D
- 5c** Event Name: Request for Research Data
- 5d** Status: Active
- 6** Save button
- 7** Add link in the Email (0) subsection

Other visible fields include: Event Type (Milestone), Parent Event, Est. Completion Date, Completion Date, Day(s), Event Details (Text area), Occurrence (Interval: Once Only, No. of Times, End Date), Completion Details (Responsibility: Not Applicable, Responsible Party), and Audit Details.

8. Compose the email
  - a. Use a **Template Code** or content from a [canned response](#)
  - b. Replace own staff ID in **Sender** field with 'PUBS'
  - c. Select To as 'This person' from the **Role** dropdown list
  - d. Click "Add"
  
9. Click **Send** to send the email now. Check in your inbox to ensure the email content is correct.
  
10. Click **Back** to go back to the previous Significant Date screen
  
11. Check your emails to see if the email came through correctly. If so, create another Significant Event following the same steps above, but instead of clicking "send", click "Save". (The email must be scheduled" in order to be batch sent



**8a** Template Code | **8** Send **9** Save **10** Back

**8b** Sender | The email address is not available!

**8c** Recipients(0) **8d** Add Delete

Type	Role	List
To	All Personnel	

Attachments(0) Compress files?  Add Delete

Choose File | No file chosen

Body Copy To New Template Preview Add To Email Body Add To Subject

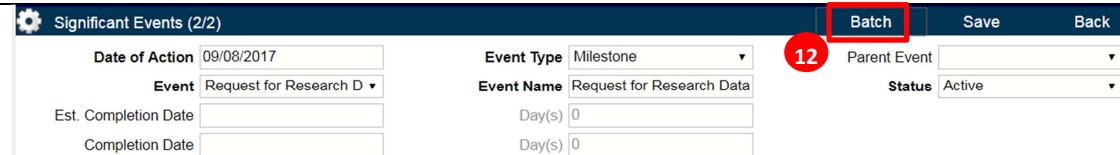
Subject | List of Items | Core

- Person Code
- Staff ID
- Student ID
- Title
- Last Name
- First Name
- Middle Name
- Full Name
- Preferred Full Name
- Overall Current
- Ext. Org. Code
- Organisation
- Confidential?
- Country of Birth
- Current?
- Date of Birth
- Gender
- Heritage
- Honours

Show code as name   
 New line   
 Ignore if none   
 All records?

Audit Details

12. Click **Batch** to display the batch search form



**12** Batch Save Back

Date of Action 09/08/2017 Event Type Milestone Parent Event

Event Request for Research D Event Name Request for Research Data Status Active

Est. Completion Date Day(s) 0

Completion Date Day(s) 0

13. Use the batch search to find the personnel to include in the batch process

14. Click **Search**

15. Tick the checkbox against the personnel to include in the batch process (You can select from multiple pages)

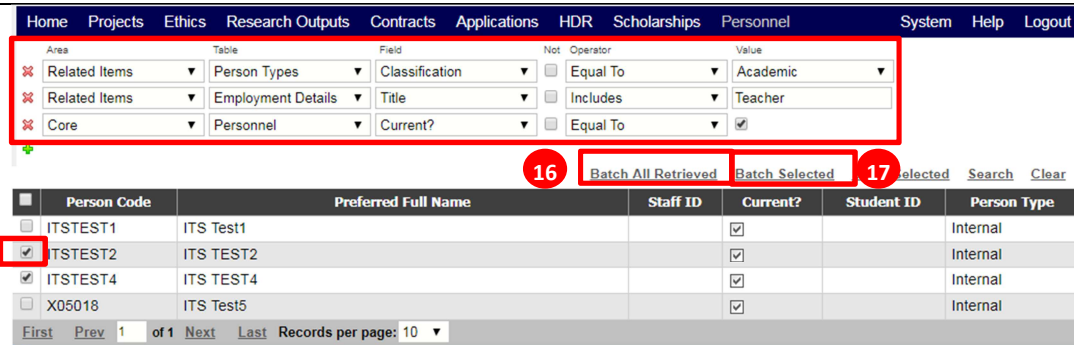
16. Click Batch All Retrieved to create the event against ALL records returned by the search

17. Click **Batch Selected** to create the event against only the records selected in Step 15 (above)

To check the batch process has worked, you can go into the personnel record you selected and view the respective significant date record.

You may run another batch process for a different College or personnel group by following steps 11 to 14 again.

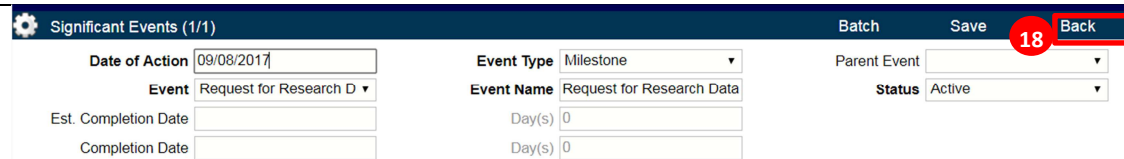
18. Click **Back** to return to the previous screen



Area	Table	Field	Not	Operator	Value
Related Items	Person Types	Classification	<input type="checkbox"/>	Equal To	Academic
Related Items	Employment Details	Title	<input type="checkbox"/>	Includes	Teacher
Core	Personnel	Current?	<input type="checkbox"/>	Equal To	<input checked="" type="checkbox"/>

Person Code	Preferred Full Name	Staff ID	Current?	Student ID	Person Type
<input type="checkbox"/> ITSTEST1	ITS Test1		<input checked="" type="checkbox"/>		Internal
<input checked="" type="checkbox"/> ITSTEST2	ITS TEST2		<input checked="" type="checkbox"/>		Internal
<input checked="" type="checkbox"/> ITSTEST4	ITS TEST4		<input checked="" type="checkbox"/>		Internal
<input type="checkbox"/> X05018	ITS Test5		<input checked="" type="checkbox"/>		Internal



Significant Events (1/1)

Date of Action: 09/08/2017

Event: Request for Research D

Event Type: Milestone

Event Name: Request for Research Data

Parent Event:

Status: Active

Est. Completion Date: Day(s) 0

Completion Date: Day(s) 0