# Research Outputs – Batch Email

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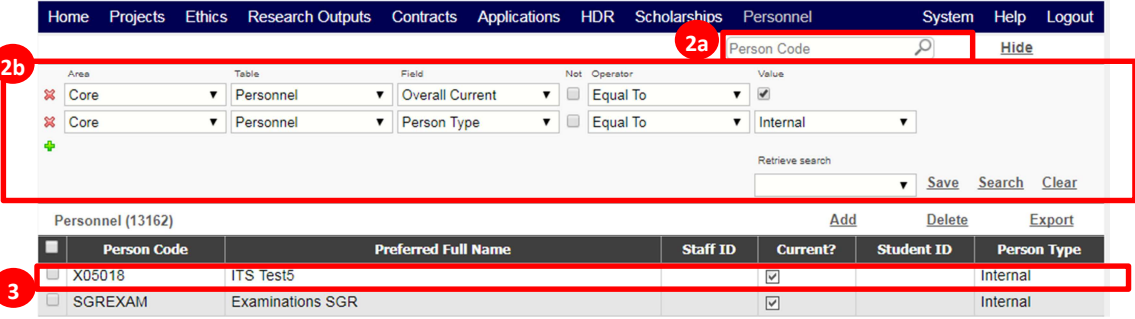
## Guidelines and rules

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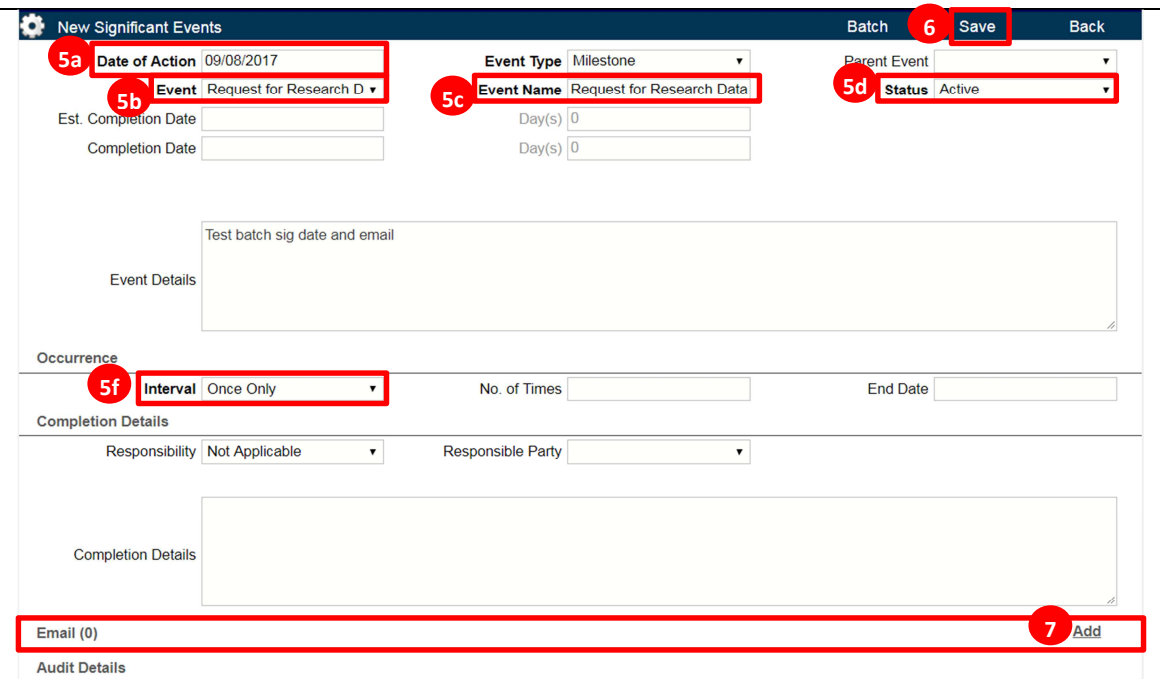- Access to the networked shared drive

## Exclusions

- Saving changes to templates in the shared directory

## Enter Research Output – Batch Email

| | |
|---|---|
| 1. Mouse over **Personnel** from the top menu and then select **Personnel** again from the drop down menu. This will display the Personnel module. |  |
| 2. Search for your own personnel record to create a sample/test significant date email.<br><br>   a. Use the **Basic** search field by entering the **Person Code** and click Search<br><br>   b. Use the **Advanced** search fields to extend your search criteria.<br><br>3. Select the personnel you want, by clicking on the row |  |
| 4. Go to the **Significant Events** subsection and click on it or click the **Add** link. This will display the Significant Dates subsection form |  |

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
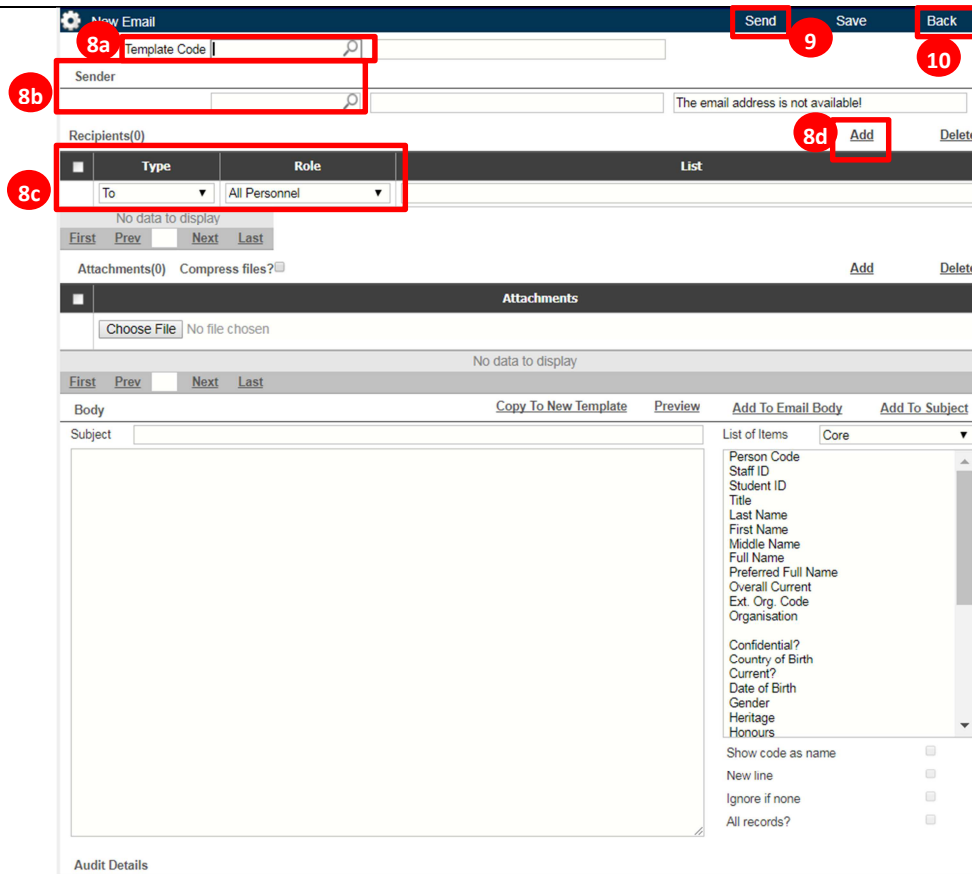
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New Significant Events | Batch | 6 Save | Back

5a Date of Action 09/08/2017    Event Type Milestone ▼    Parent Event ▼
5b Event Request for Research D ▼    5c Event Name Request for Research Data    5d Status Active ▼
Est. Completion Date    Day(s) 0
Completion Date    Day(s) 0

Event Details    Test batch sig date and email

Occurrence
5f Interval Once Only ▼    No. of Times    End Date

Completion Details
Responsibility Not Applicable ▼    Responsible Party ▼

Completion Details

Email (0)    7 Add

Audit Details
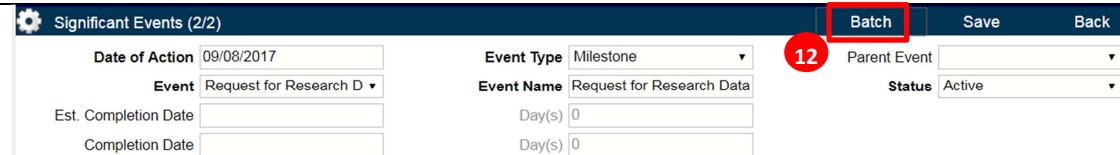
| | |
|---|---|
| 8. Compose the email<br>    a. Use a **Template Code** or content from a [canned response](#)<br>    b. Replace own staff ID in **Sender** field with 'PUBS'<br>    c. Select To as 'This person' from the **Role** dropdown list<br>    d. Click "Add"<br><br>9. Click **Send** to send the email now. Check in your inbox to ensure the email content is correct.<br><br>10. Click **Back** to go back to the previous Significant Date screen<br><br>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 |  |
| 12. Click **Batch** to display the batch search form |  |

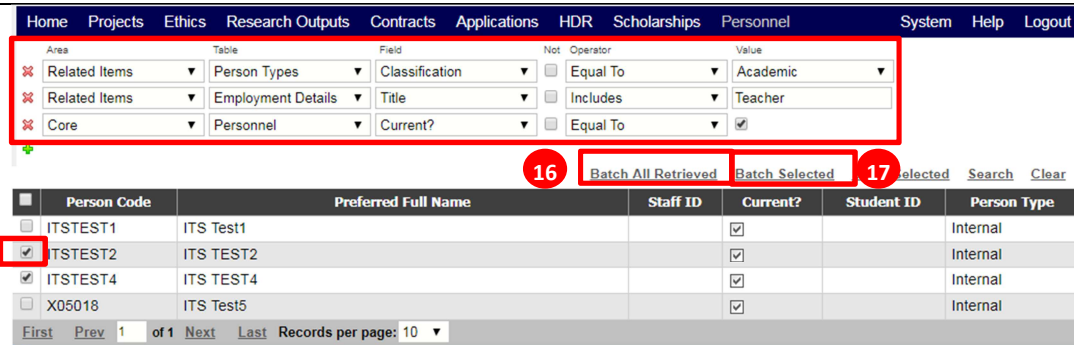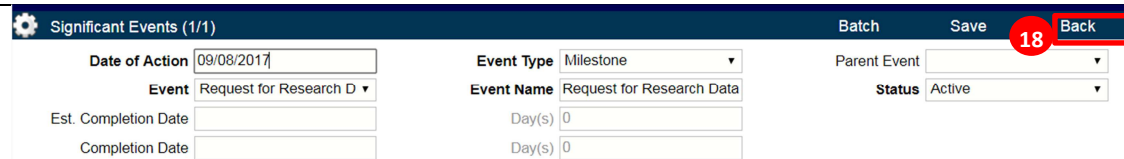| | |
|---|---|
| 13. Use the batch search to find the personnel to include in the batch process<br><br>14. Click **Search**<br><br>15. Tick the checkbox against the personnel to include in the batch process (You can select from multiple pages)<br><br>16. Click Batch All Retrieved to create the event against ALL records returned by the search<br><br>17. Click **Batch Selected** to create the event against only the records selected in Step 15 (above)<br><br>To check the batch process has worked, you can go into the personnel record you selected and view the respective significant date record.<br><br>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 |  |