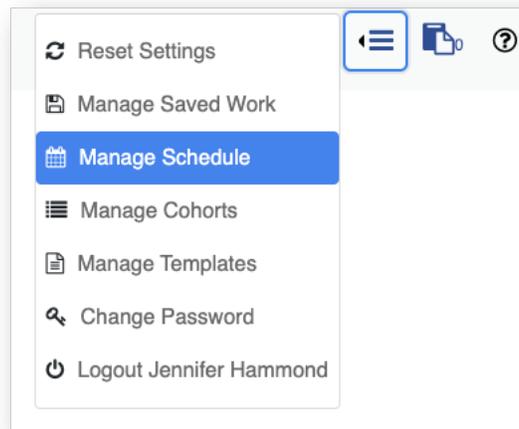




# PRECISION CAMPUS TUTORIALS

## Scheduling a Saved Report Email Burst

Once a report is saved it can be scheduled to be shared with others via email. This feature can be found in the upper right corner of the page using the **Manage Schedule** option.



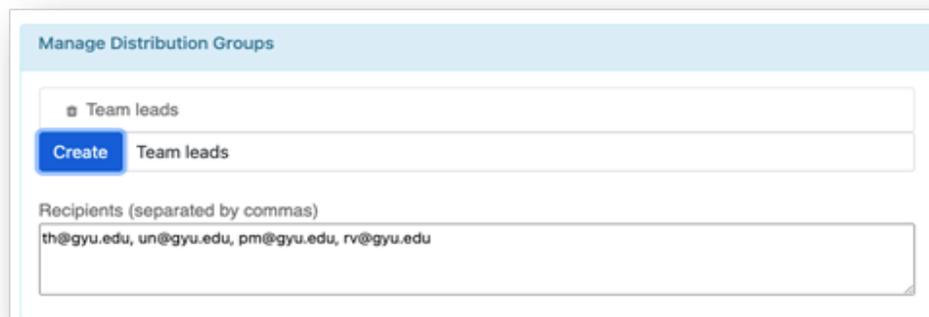
This option allows for creation of new scheduled reports and management of previously scheduled reports.

### Creating a distribution group

If a distribution group is desired, create a new group first.

Below *Manage Distribution Groups*

1. Type the Name of the distribution group.
2. Add the recipients by email address separated by a comma.
3. Click **Create**.

A screenshot of the 'Manage Distribution Groups' form. The form has a light blue header with the title 'Manage Distribution Groups'. Below the header, there is a text input field containing 'Team leads'. To the left of this field is a blue 'Create' button. Below the input field, there is a label 'Recipients (separated by commas)' and a text input field containing the email addresses 'th@gyu.edu, un@gyu.edu, pm@gyu.edu, rv@gyu.edu'.

## Creating a New Scheduled Email

For a new scheduled report begin by filling out the left side of the form

1. Fill in a *Schedule Name*.

NOTE: This is for personal management of scheduled reports and can only be seen by person creating the schedule

2. Create a *Message*.

NOTE: This will show in the body of the email message that the recipient receives.

3. Type in email addresses of recipients separated by a comma or use a distribution group which can be added once the schedule is created (See below).

NOTE: It is recommended that the scheduled email always be tested first. (See below).

4. Type in your *email address*.
5. Set *days and time* with noted formatting.
6. Click **Create New**.

### Selected Schedule

Schedule Name

Message  
Use Shift-Enter for a single-spaced line break.

Recipients (separated by commas)

Your email address

Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Send Time (HH:MM AM)

Once scheduled email is saved it will populate at the top of the page.

Scheduled Email Bursts							
Schedule Name	Recipients	Days	Send Time	Last Run	Status	Delete	
Weekly Student Success	jh@gyu.edu	Tue	9:00 AM	5/25/2022, 7:55:00 PM	Not Yet Sent		
Weekly Student Success	Team leads	Tue	9:00 AM	5/25/2022, 7:55:00 PM	Not Yet Sent		
Enrollment trends	Deans	Tue	9:00 AM	5/25/2022, 7:55:00 PM	Not Yet Sent		

Clicking on schedule name allows for addition/deletion of report(s), distribution group(s), and/or updating distribution groups and fields in a scheduled email

### Adding a Report to a Schedule Email

1. Click on the *Schedule Name*.
2. Click on **Choose a Report**.
3. Choose 1 or more saved reports.
4. Click **Update Existing**.

Weekly Student Success **1** Team leads Tue 9:00 AM 6/9/2022, 7:55:00 PM Not Yet Sent

#### Selected Schedule

Schedule Name

Message  
Use Shift-Enter for a single-spaced line break.

Content typed in this box will display in the email for recipients.

Recipients (separated by commas)

Your email address

Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Send Time (HH:MM)

**4** Clear Fields Update Existing Create New

#### Reports for this Schedule

Choose one or more reports to include in your schedule

<Please choose a report> **2**

Year Over Year Enrollment **3**

#### Distribution Groups for this Schedule

Choose one or more distribution groups for your schedule

Add Distribution Group

#### Manage Distribution Groups

Deans

Create New Distribution Group

## Adding a Distribution Group to a Scheduled Email

1. Click on the *Schedule Name*.
2. Click on **Add Distribution Group**.
3. Choose 1 or more group.
4. Click **Update Existing**.

## Updating a Distribution Group

Below *Manage Distribution Groups*

1. Click on *Distribution Group*.
2. Update recipients email addresses.
3. Click **Update**.

This will update the distribution group and populate the group in the scheduled emails that it is added to.

## Testing a scheduled email

Before sending an email to others, a test is recommended to make sure the email displays as intended.

1. In the recipient field add your address only when you create the schedule.
2. Follow all other directions for creating the schedule.
3. After updating the existing schedule click the *airplane* to the right of the scheduled email at the top of the page.
4. Verify that email displays properly.
5. Populate the recipient box with intended addresses.
6. Click **Update Existing**.

## To delete a report, distribution group or scheduled email

1. click the trash can next to the item  
NOTE: deleting reports and distribution groups for this schedule just removes them from the scheduled email and they can be re-added if needed. Scheduled emails and distribution groups are deleted immediately upon clicking trash can.

Schedule Name	Recipients	Days	Send Time	Last Run	Status	Delete
Weekly Student Success		Tue	9:00 AM	6/7/2022, 9:00:00 AM	Success	

### Selected Schedule

Schedule Name

Message  
Use Shift-Enter for a single-spaced line break.

Content typed in this box will display in the email for recipients.

Recipients (separated by commas)

Your email address

Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Send Time (HH:MM AM)

### Reports for this Schedule

Year Over Year Enrollment 

<Please choose a report>

### Distribution Groups for this Schedule

Deans 

### Manage Distribution Groups

 Deans

Deans

Recipients (separated by commas)

ne@gyu.edu, we@gyu.edu, st@gyu.edu