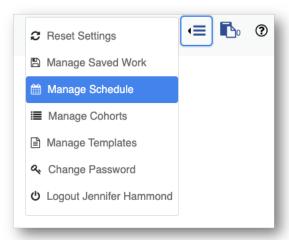# PRECISION CAMPUS TUTORIALS

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.**

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
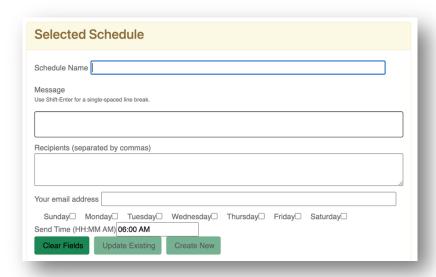
2. Create a *Message.*

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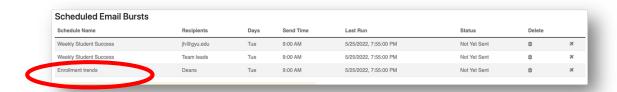
   NOTE: It is recommended that the scheduled email always be tested first. (See below).

4. Type in your *email address.*

5. Set *days and time* with noted formatting.
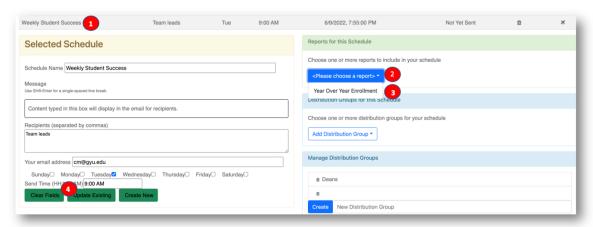
6. Click **Create New.**

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

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
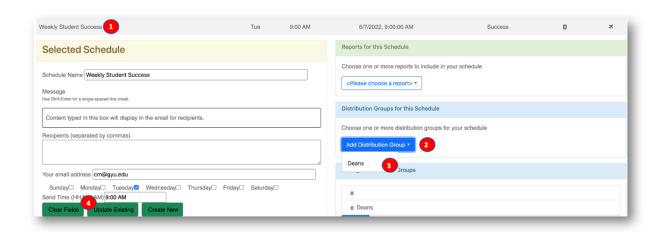
Adding a Report to a Schedule Email

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

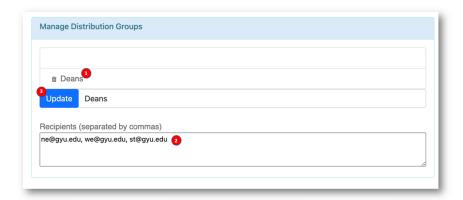## Adding a Distribution Group to a Scheduled Email

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 <u>your address only</u> 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.