## **Automatic Emailing of Follow-Up Records**

This is a new feature in info:HR. This feature setup needs to be coordinated with the IT Department since the automatic email relies on setting a task on the server via the Task Scheduler. If the task cannot be run on the server, the application will not be able to automatically send email reminders to the appropriate staff. Below are the steps needed to successfully use this function.

- The Security Master setting for the Follow-ups Code Email Matrix must be set for any user wishing to maintain or inquire on the matrix.
  - a. To complete this function, go to the Security Master under the Setup menu item and locate the employee's profile record.
  - b. Click on More Security / Utilities.
  - c. Click either Maintain or Inquire across from the security item Follow Up Code Email Matrix. Save the change once the selection has been made.
    - 🗵 🛛 🗐 Follow Up Code Email Matrix
  - d. Close info:HR and re-open to rebuild the security profile.
- Under the Setup menu, go to the Follow-ups Code Email Matrix screen. Open the
  Follow-Up Reason Codes lookup screen by clicking the Reason magnify glass and turn on
  the Send Email option for Follow-Up codes to be included in this feature. This setting
  "turns on" the email sending feature provided that the Follow-Up Code is included in
  the Follow-ups Code Email Matrix screen.

OLLOW UP DATE	REASON CODES
Code	Description
BUDG	Budgets
EDUC	Education Alert
EDTO	Employment Status To Date Code
HSFU	Health & Satety Follow Up
	Leave of Absent
OHS1	OH&S Course Due
PE	Passport Expiration
PREV	Performance Review
MAT	Return from Mat/Pat Leave
SREV	Salary Keview
	Vacation Exceeded
WP	Work Permit Expiration
BUDG	Budgets Incentive 🗹 Seniority 🔽 Absent 🔽
	Send Email
	Point 0
	Foint
	Eind
Inactive Code E	
Select Close	e <u>E</u> dit <u>OK</u> <u>Cancel N</u> ew <u>D</u> elete <u>P</u> rint

- $\circ$   $\,$  Click on the Follow Up code to be included in the feature.
- Click on the **Edit** button.
- Click on the **Send Email** check box and click on **OK** to save the change. This step only identifies which codes will be included.

• Close the Follow-Up Reason Codes lookup screen to return to the Follow-ups Code Email Matrix screen.



- This matrix is used to identify who should be receiving the email and when the email should be delivered. To complete this matrix:
  - A Follow Up **Reason** is entered.
  - Days in Advance determines when the email should be first sent. The value entered is subtracted from the Follow Up Effective Date.
  - **Repeat Frequency** defines how frequently the email will be sent.
  - **Employee** is checked if the employee should get the reminder.
  - **Reporting Authorities** checked will get reminders of the Reason entered.
  - Other Employees are entered if an email reminder needs to be sent for the specific reason but the employee is not part of the Reporting Authority structure.
  - Other Email Address(es) are entered should non-employees or generic email addresses need to be notified.
- As part of this release, the release package includes a special file called "infoHR\_FollowUpEmail.exe".
  - a. This program is used by the network's Task Scheduler. It reads the Follow-ups Code Email Matrix criteria and the Send Email flag on the Follow Up Code table master to determine when emails should be sent.
  - b. A log is created in the info:HR Reports folder. There is a report called **Follow-Ups Email Log** under the **Report** menu to print the contents of the log file.
    - j. 🔤 Follow-Ups Email Log

## **Creating a Scheduled Task:**

This function is typically performed by the IT department. Prior to completing the steps below, the info:HR client must be installed on the server. An info:HR client installation requires a reboot of the server.

On the server under Administrative Tools, click on Task Scheduler.

<b>(=</b> E	Create Basic Task								
<u>.</u> Те	Import Task	Name	Status	Triggers	Next Run Time	Last Run Time	Last Run Result	Author	Created
	Display All Running Tasks	backup hrss	Disabled	At 2:09 AM every day		28/12/2011 2:09:44 AM	(0x0)	HRSS-SERVER3\Administrator	29/03/2011 3
Г¥.	Disable All Tasks History	backup ticket	Disabled	At 1:33 AM every day		28/12/2011 1:33:20 AM	(0×0)	HRSS-SERVER3\Administrator	12/10/2010 1
	New Folder	Backup to ex	Ready	At 1:00 AM every day	14/06/2014 1:00:59 AM	13/06/2014 1:00:59 AM	(0×0)	HRSS-SERVER3\Administrator	28/12/2011 8:
-	Defeat	Daily Hosted	Ready Dicabled	At 3:00 AM every day At 9:43 AM every day	14/06/2014 3:00:00 AM	27/03/2012 9:43:55 AM	(0x0) (0x1)	HRSS-SERVER3(admin HDSS-SEDVED3)Administrator	27/03/2012 0
-	Kerresh	- 00 0054	Disabled	AC 9.10 API EVELY DBy		27/03/2012 9:43:33 Mil	(0.1)	TROD-DERVERO(Maininscrator	27/03/2012 9.
	Help								
			1	fa or fa r	fun f				
		General Trigger	's Action	s   Conditions   Settin	gs   History				
		Name: b	ackup hrss	s-server					
		Location:							
		Authon H	000.000	EP3\Administrator					
		Autrion: H	IN-55-SERVI	End yourninistrator					
		Description:							
		- Security option	ns						
		When running	the task, i	use the following user	account:				
	HRSS-SERVER3/Administrator								
		G Run wheth	er user is h	agged on or not					
			chara access	suger on of hot	hi hai na na sa sa ta I I -				
		j Do not	score pass	woru. The task will on	ny nave access to local r	esources			
		☑ Run with highest privileges							

• Click on the menu item Action / Create Basic Task.

Create Basic Task Wizard	x
Create a Basic Task	< c
Create a Basic Task Trigger Action Finish	Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane. Name: Description:
	< Back Next > Cancel

• Enter the **Name** and click the **Next** button.

## **Follow-Up Emails**

Create Basic Task Wizard	×
迿 Task Trigger	
Create a Basic Task Trigger Action Finish	When do you want the task to start?  C Daily  Weekly  O Monthly  One time  When the computer starts  When I log on  When a specific event is logged
	< Back Next > Cancel

• Use the selected default **Daily** and click on the **Next** button.

Create Basic Task Wizard	×
Daily Daily	
Create a Basic Task Trigger	Start: 13/06/2014 💽 12:27:43 PM 📥 🗖 Synchronize across time zones
Daily Action	Recur every: 🛛 days
Finish	
	<pre></pre>

- Enter the **Start** date and time. If necessary, click on **Synchronize across time zones**.
- Keep the default **Recur every** to 1 day and click on the **Next** button.

Create Basic Task Wizard		×
o Action		
Create a Basic Task		
Trigger Daily	What action do you want the task to perform?	
Action	Start a program	
Finish	🔘 Send an e-mail	
	🔿 Display a message	
	< Back Next > Cancel	

• Keep the default setting of **Start a program** and click on the **Next** button.

Create Basic Task Wizard			×
🔟 Start a Program			
Create a Basic Task			
Trigger Daily Action Start a Program	Program/script:		Browse
Finish	Start in (optional):		
		< Back	Vext > Cancel

- Click on the **Browse** button and locate the **"infoHR\_FollowUpEmail.exe"** file which will be found in the info:HR Reports folder.
- Click on the **Next** button.

Create Basic Task Wizard			×		
迿 Summary					
Create a Basic Task					
Trigger	Name:	infoHR Email Scheduling			
Daily	Description:				
Action					
Start a Program					
Finish					
	Trigger:	Daily; At 12:27 PM every day			
	Action:	Start a program; D:\Data\OKTire\IhrVadim.EXE			
	🔲 Open the	Properties dialog for this task when I click Finish			
	When you click Finish, the new task will be created and added to your Windows schedule.				
		< Back Finish C	ancel		

• Click on the **Finish** button to complete this scheduled task.