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.

    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.

    - 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.
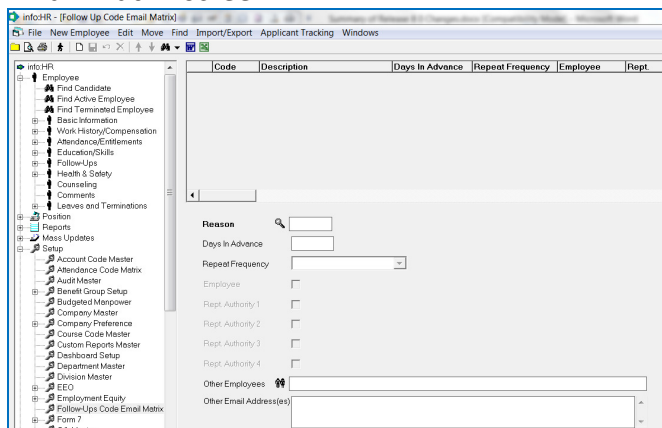

- o This matrix is used to identify who should be receiving the email and when the email should be delivered. To complete this matrix:
    - A Follow Up **Reason** is entered.
    - **Days in Advance** determines when the email should be first sent. The value entered is subtracted from the Follow Up 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.
   i. 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.

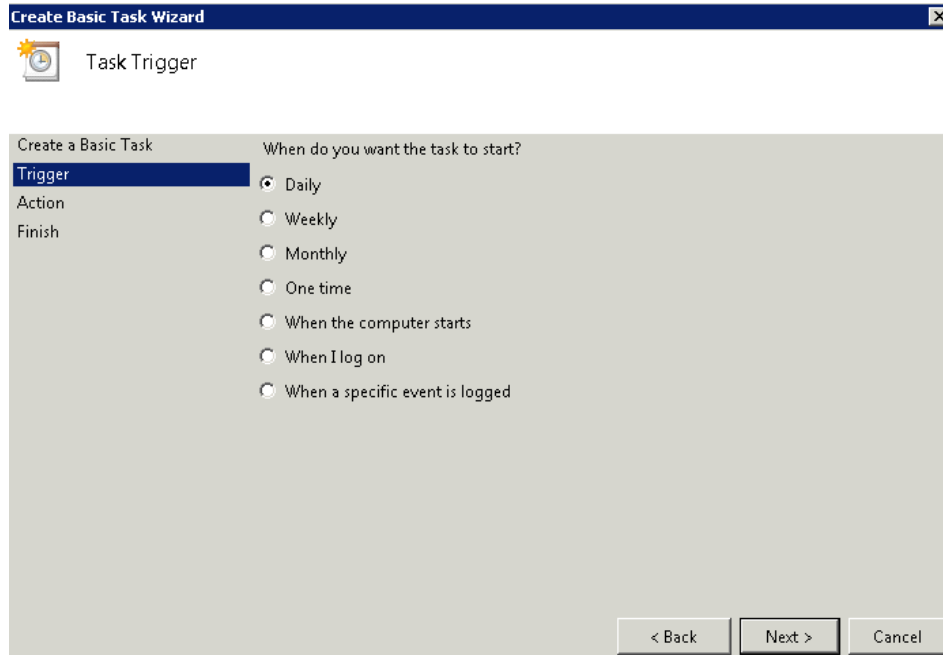On the server under **Administrative Tools**, click on **Task Scheduler.**
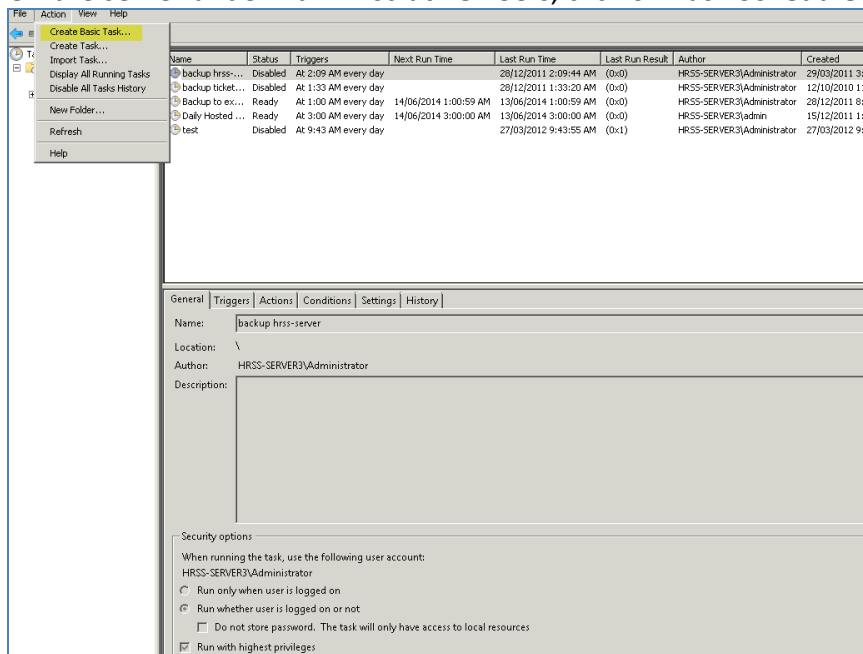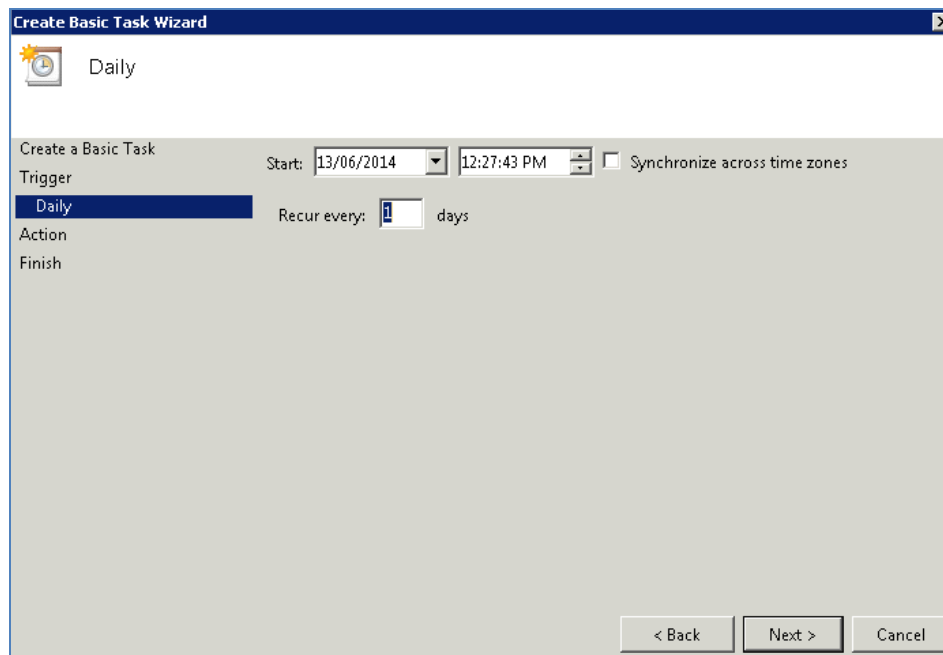

- Click on the menu item **Action** / **Create Basic Task**.
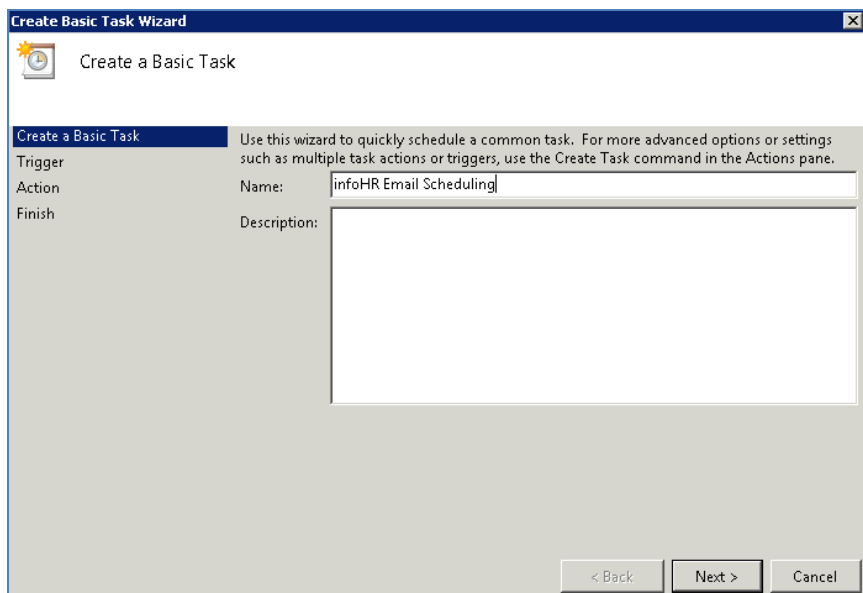
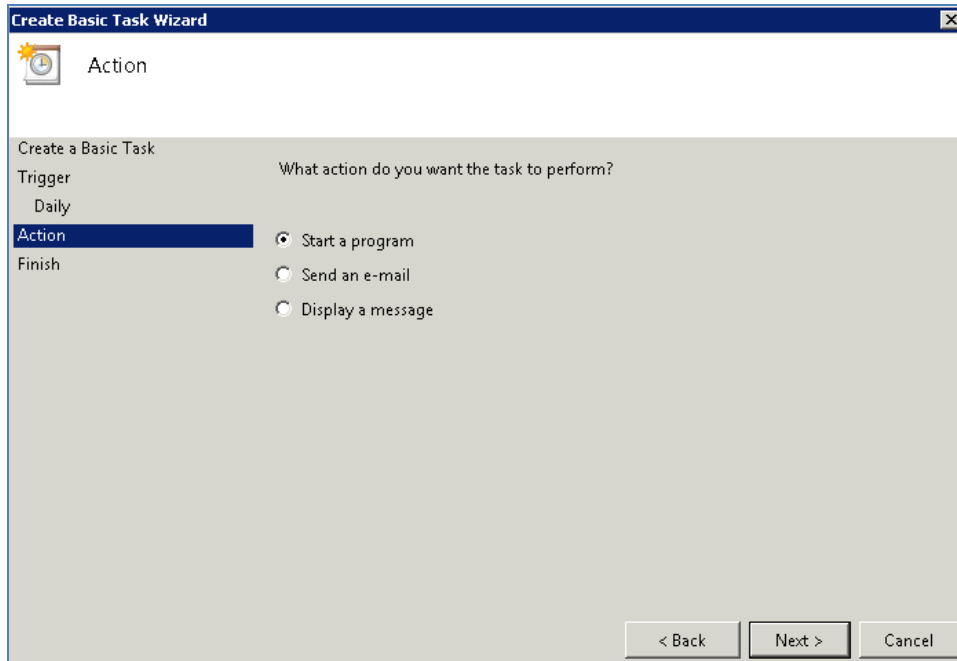- Enter the **Name** and click the **Next** button.

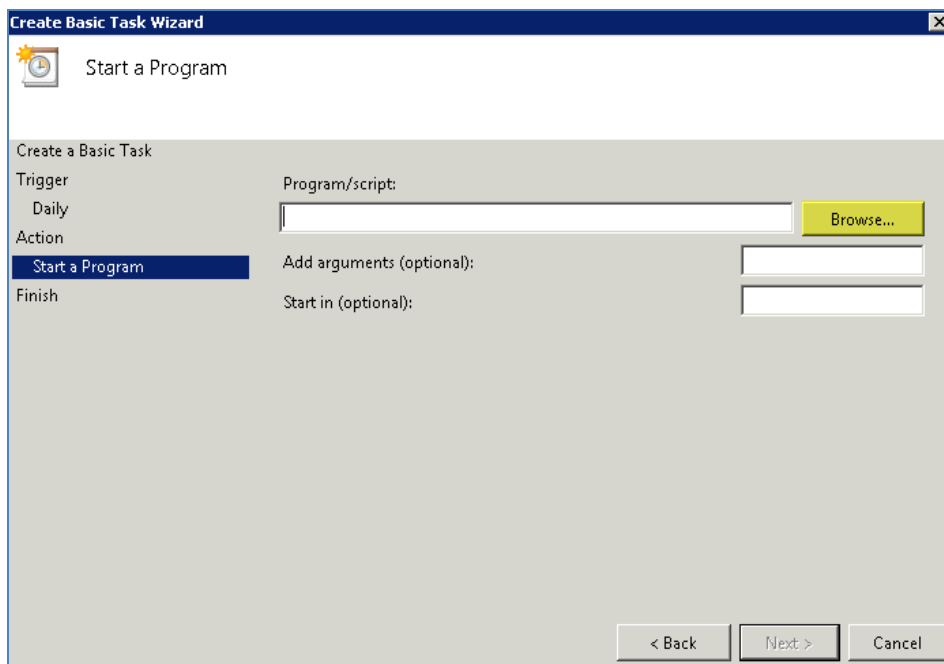- Use the selected default **Daily** and click on the **Next** button.

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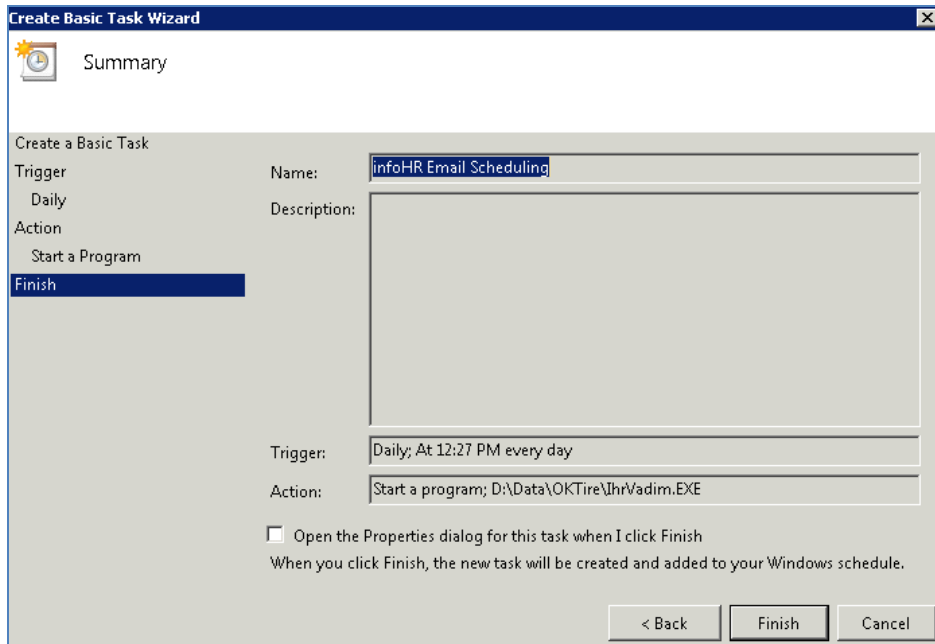- Keep the default **Recur every** to 1 day and click on the **Next** button.

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

- 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.

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