

Basics Series-4006

# Email Basics

Version 9.0

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## Notes

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# Workbook

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## Email

Email features are embedded throughout People-Trak to allow you to send email to and from a variety of sources. Some of the email features are not applicable within certain modules. For example, if a module does not have an email address (if the item being tracked is not a person or cannot have an email address); there is no way to utilize the ability to click on the address and send an email. Likewise, it would not be possible to utilize the email to a group of records, because there would be no email address to send to.

## Enabling Email

When People-Trak is installed, an important step is enabling email. Three entries in Enterprise Setup are required in order for the email feature to function.

The Email Server Address, User ID and Password must be entered correctly in order for email to be sent from within People-Trak.

## Send Email Screen

There is a standard Send Email screen used when sending emails from within a record and the Document Viewer (titled Output to Email in that case). This screen is used to capture the information necessary to send single or group emails.

## Recipients Tab

The Recipients tab allows you to enter the recipients of the email.

### To Address Type

The address type for the To field. This field is supported by the Select Email Address Type popup. All of the possible address types are described below. Some of these will not be available based on the method used to invoke this screen. After you choose the address type, the corresponding address field behaves accordingly.

- Address Book
- Field Substitution
- Org Chart
- Position

Address Book allows you to select from several email sources across all modules by clicking Address Book button or enter email addresses manually.

Field Substitution allows you to select from a list of email-type fields in the current module. At the time the email is sent, the appropriate email address will be substituted based on the record. Only one substitution field can be selected per email address field. This option is not available for Schedule triggers because a record is not active.

Org Chart allows you to select the Org Chart level: Supervisor, Supervisor + 1, and Supervisor + 2. The appropriate email address will be substituted based on the employee record when the email is sent. Only one org chart level can be selected per email address

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field. This option is only available in the Personnel Management module and is not available for Schedule triggers because a record is not active.

Position allows you to select a position. The appropriate email address will be substituted for that position when the email is sent. Only one position can be selected per email address field.

## To

The email addresses to which the email is to be sent. The contents of this field are determined by the method used to invoke this screen. The popup for this field is determined by the To Address Type field. If the To Address Type is Address Book, you can manually add email addresses to this field or use the Address Book button to add one recipient at a time. When manually entering addresses, separate each email address with a comma. When invoking this screen from an open record group, clicking the Group button will fill the To field with the addresses of the current group. There is a separate email sent for each email address in the To field.

## CC Address Type

The address type for the CC field. This field is supported by the Select Email Address Type popup.

## CC

Any email address that is to receive a carbon copy of this email. If the email is to be added to notes, no attempt is made to send a note to any record associated with the CC email address. The CC email addresses will receive a copy of each email sent. The popup for this field is determined by the CC Address Type field. If the CC Address Type is Address Book, you can manually add email addresses to this field or use the Address Book button to add one recipient at a time. When manually entering addresses, separate each email address with a comma.

## BCC Address Type

The address type for the Blind CC field. This field is supported by the Select Email Address Type popup.

## Blind CC

Any email address that is to receive a carbon copy of this email without being visible to the other "To" or "CC" recipients. If the email is to be added to notes, no attempt is made to send a note to any record associated with the Blind CC email address. The Blind CC email addresses will receive a copy of each email sent. The popup for this field is determined by the BCC Address Type field. If the BCC Address Type is Address Book, you can manually add email addresses to this field or use the Address Book button to add one recipient at a time. When manually entering addresses, separate each email address with a comma.

**Note:** The To, CC and Blind CC fields have a limit of 8,000 characters. If that maximum is reached, the field will be truncated at the end of the previous email address.

# Message Tab

The Message tab allows you to enter the message portion of the email.

## Email Definition

The email definition to use for this email, if any. If an email definition is selected, the settings from that definition are defaulted in the associated fields on this tab and the Attachments tab,

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but can be overridden. This field is supported by the Select Email Definition popup, which lists all definitions entered using the Email Definitions option on the Administration menu.

## From Address Type

The address type for the From field. This field is supported by the Select Email Address Type popup.

## From

The email address from which to send this email. The email address of the current user is defaulted but can be changed. If this field is cleared, the email address of the current user is used. The popup for this field is determined by the From Address Type field. If the From Address Type is Address Book, you can manually add an email address to this field or use the Address Book button to add the address.

**Subject** The subject of the email. If the email is to be added to notes, the entry in this field is added as the first line of the note text in the formation shown below.

Email Subject: *Subject*

## Template

The name of an email template to be used for the text of the email. If the email is to be added to notes, this text becomes the text of the note. The email text is added after the first line that was composed of the email subject. Thus, when the notes are listed in unexpanded form, you can readily determine which notes were generated by email. An email template is created using the Email Templates option on the Templates menu. This field is supported by the Select Email Template popup.

**Note:** If the text for this email has been entered in the Text field, the Template field is not accessible. You can enter a template or enter text, but not both.

## Text

The text of the email. If the email is to be added to notes, this text becomes the text of the note. The email text is added after the first line that was composed of the email subject. Thus, when the notes are listed in unexpanded form, you can readily determine which notes were generated by email. This field is supported by the Simple Editor popup.

**Note:** If a template has been assigned to this email using the Template field, the Text field is not accessible. You can enter a template or enter text, but not both.

## Add Closing

Adds a blank line and closing text to the Text field. This closing is specified for the current user by the Email Closing template selected in the Email Closing field of User Setup. This button is only enabled on the Message tab when in the Text field.

# Attachments Tab

## Attachment 1

The path of the file that is to be attached to this email. This field is supported by a Select Attachment popup that lists the attachments that have been specified in the Email Attachments process. It is also supported by the File Search button that allows you to select any file to which you have access, as long as the Allow File Search in Email check box is selected for your user in Security Setup. The pre-defining of attachments is useful for attachments that are going to be used repeatedly and is required for emails sent as part of

trigger actions.

If you are in Document Viewer and choose Output to Email, the Attachment 1 field will include the path to the temporary PDF file that is automatically created from the document. The temporary PDF file name consists of the first four letters of the user name followed by a randomly-generated four-digit number.

## Encrypt 1

A check box that allows you to specify whether or not the attachment specified in the Attachment 1 field should be encrypted when sent via email. Encryption is recommended for a document with sensitive information on it. Select the check box to encrypt the attachment. Clear the check box to not encrypt the attachment. If this check box is selected, the attachment will be encrypted and password protected when attached to an email. The recipient will receive an email informing them of the password for the document that is sent in a separate email.

If an email attachment was selected in the Attachment 1 field and the Encrypt on Send check box was selected when that email attachment was created in the Email Attachments process, this check box will be defaulted to selected. You can still choose to deselect the check box on a per email basis. **Note:** Only PDF document attachments can be encrypted.

## Attachment 2

The path of the file that is to be attached to this email. This field is supported by a Select Attachment popup that lists the attachments that have been specified in the Email Attachments process. It is also supported by the File Search button that allows you to select any file to which you have access, as long as the Allow File Search in Email check box is selected for your user in Security Setup. The pre-defining of attachments is useful for attachments that are going to be used repeatedly and is required for emails sent as part of trigger actions.

## Encrypt 2

A check box that allows you to specify whether or not the attachment specified in the Attachment 2 field should be encrypted when sent via email. Encryption is recommended for a document with sensitive information on it. Select the check box to encrypt the attachment. Clear the check box to not encrypt the attachment. If this check box is selected, the attachment will be encrypted and password protected when attached to an email. The recipient will receive an email informing them of the password for the document that is sent in a separate email.

If an email attachment was selected in the Attachment 2 field and the Encrypt on Send check box was selected when that email attachment was created in the Email Attachments process, this check box will be defaulted to selected. You can still choose to deselect the check box on a per email basis.

**Note:** Only PDF document attachments can be encrypted.

## Attach Document

A document that you want to attach to this email. This field is supported by the Select Document popup.

## Group Type

The group type to use when the document is generated. Current Group will show the information for the current record group; whereas Current Record will show only the current

record's information on the document. A record type of Use Query allows you to use the query from the document to determine the records to use for the document. Choosing the current record or current group ignores the document's query. For Alert Triggers, you only have a choice of Current Record or Use Query because no group is active. For Schedule Triggers, you only have a choice of Use Query because no records are opened for that type of trigger.

## Encrypt Document

A check box that allows you to specify whether or not the document specified in the Attach Document field should be encrypted when sent via email. Encryption is recommended for a document with sensitive information on it. Select the check box to encrypt the document. Clear the check box to not encrypt the document. If this check box is selected, the document will be encrypted and password protected when attached to an email. The recipient will receive an email informing them of the password for the document that is sent in a separate email.

In the properties for a document, you can specify that you want encryption by default. The Encrypt Document check box will be defaulted accordingly here, but you can change it.

## Add Email to Notes

A check box that allows you to specify whether or not the email and any applicable attachment will be added to the notes. Select the check box to add a note to the record associated with each email address in the To field. Clear the field to not add a note to the records. This check box is defaulted to selected if the Add Email to Notes check box is selected for the current module in Module Setup.

**Note:** If you are in a module whose key record does not have an email address associated with it, the record cannot have a note attached to it. For example, if you are in the Training Course module, the key record is the training course, which of course is not a person that can receive an email. Also, if one of the To recipients does not have a People-Trak record associated with it, such as in the case of a vendor, then no record exists to have a note attached to it.

## Note Category

If the Add Email to Notes check box is selected, this field determines the note category to which the note will be added. It is supported by the Select Category popup. A note cannot be added unless a note category is specified. If the Add Email to Notes check box was defaulted to selected, this field is also defaulted to the category specified for the current module in Module Setup.

# Sending Email to the Current Record

For those modules with an Email field, you can send an email to the current record in one of three ways. You can click the Email popup button adjacent to the field, or you can use the Send Email option on the File menu or Send Email button on the Tool Bar. The Send Email screen is displayed, and the "To" field contains the email address from the Email field. If the Email field was blank, you can enter an email address directly in this field, but it is recommended that you add the address to the Email field first.

# Sending Email to the Current Group of Records

For those modules with an Email field, you can send an email to each record in the current group by using the Send Email option on the File menu or the Send Email button on the Tool

Bar. When the option is selected, the Send Email screen is displayed. Click the Group button and the addresses for the current group are put into the “To” field. Sending an email to a group of records is very similar to sending an email to a single record. You can add a CC and attach to notes as desired. The primary difference is in the “To” field.

The “To” field contains the email address for each record in the group, in alphabetical order. If there is a large list of addresses, you can use the multi-line popup button to see all addresses. When the group is created, any record that does not have an email address in the email field will be dropped from the list. So, you cannot assume that every record that has been selected automatically gets an email unless every record does indeed have an email address. If you choose to attach the email to notes, the email will be attached to the notes for each record listed. If a record is in the overall group, but is not in the email list, the record will not receive an attached note.

## Creating an Email Specification

You can create an email specification by using the Email option on the Documents menu. This option allows you to create and send an email without having to be in a record group.

Email Specifications use an Explorer that is very similar to the one used for other documents.

When you create a new or open an existing email specification, the Email screen is displayed, which uses four tabs. The Specification tab is used to define basic information about the email as well as specify the recipients. The Query tab contains the standard query grid to determine for whom the email specification is going to be sent. The Message tab is used to specify the message portion of the email. The Attachments tab is used to define what attachments to include in the email.

**Note:** Because the Query tab is used in many screens, it is discussed separately. The Message and Attachments tabs are the same as those used in the Send Email screen.

### Specification Tab

The Specification tab is similar to the regular Send Email screen except the Explorer Category and Category fields are included because the Explorer and security are involved.

## Emailing from the Document Viewer

You can email any document that appears in the Document Viewer to any desired email address or addresses. People-Trak supports two different types of email document distribution: by address and by distribution list. When a document has been displayed in the Document Viewer, you can email the document using the Output to Email button on the Tool Bar or the Output to Email option on the File menu.

### PDF Documents

When a document is selected for email, the document is first saved as a temporary Portable Document Format (PDF) file. PDF files can be readily attached as emails and are highly compressed. The person who receives an email with a PDF document will require a PDF reader. PDF readers are also readily available via the Internet. The PDF file that has been attached will be deleted when you exit the Document Viewer.

### Output to Email Screen

When the Output to Email option is used from within the Document Viewer, the Output to Email screen is displayed. This screen is identical to the Send Email screen. Some of the common fields act uniquely with this feature. . If a distribution list has been defined, the “To”

field is filled with a list of the emails defined in the distribution list, and you can add to it. If no distribution list has been defined, this field will be blank and you can specify any email address you desire. The subject is defaulted to the name of the document. Within the Attachment 1 field, the file is automatically created and includes the User ID followed by a number.

**Note:** If the document has email breaks, you are asked if you want to continue with the output to email. If you choose to continue, each section of the document is automatically emailed to the appropriate email address; the whole document will be emailed to anyone specified in the Output to Email screen itself. So, it is possible to email a document up to three different ways in one output to email use: using email breaks, specifying an email distribution list in the document's properties and adding additional recipients at the time of output to email.

## Creating an Email Distribution List

Document distribution lists can be created for all document types except Lookup Favorite, which does not actually generate a document, and Email, which has its distribution list defined by its query. Within the Explorer, the Document Properties screen has an Email tab that can be used to build a distribution list of the email addresses for those persons to whom the document is to be emailed. You can enter email addresses by type as well as use a favorite distribution list. If you use both the email type address list and the favorite list, both will be used to build the email's distribution list.

## Email Attachments

The Email Attachments process allows you to select and manage files that are to be used as attachments in emails. A People-Trak archived document or any PDF file to which you have access can be saved as an email attachment. The pre-defining of attachments is useful for attachments that are going to be used repeatedly and is required for emails sent as part of trigger actions. This process is only available to users with Administrator rights, which allows you to strictly control what can be attached to emails if you also restrict access to the File Search capability within emails.

Once an attachment is added and saved using this process, the attachment file is copied to the database. If you need to later make changes to the attachment, you can edit the original document and reselect. In any Send Email screen, you can select an attachment defined in this Email Attachments process by using the popup button in one of the Attachment fields.

The Email Attachments option on the Administration menu allows you to specify that a file can be used as an email attachment.

## Email Definitions

The Email Definitions process allows you to create email definitions that can then be used over and over again in the many methods of sending email in People-Trak. The Message tab allows you to specify who the email is from and what template or text to include in the email. The Attachments tab allows you to specify what files or documents to attach to the email as well as whether or not you want to add the email to the notes of the record. The email processes throughout People-Trak allow you to select one of these email definitions if you choose. When an email definition is chosen, the message and attachment information from that definition is defaulted but can be overridden.

The Email Definitions option on the Administration menu allows you to specify that a file can be used as an email attachment.

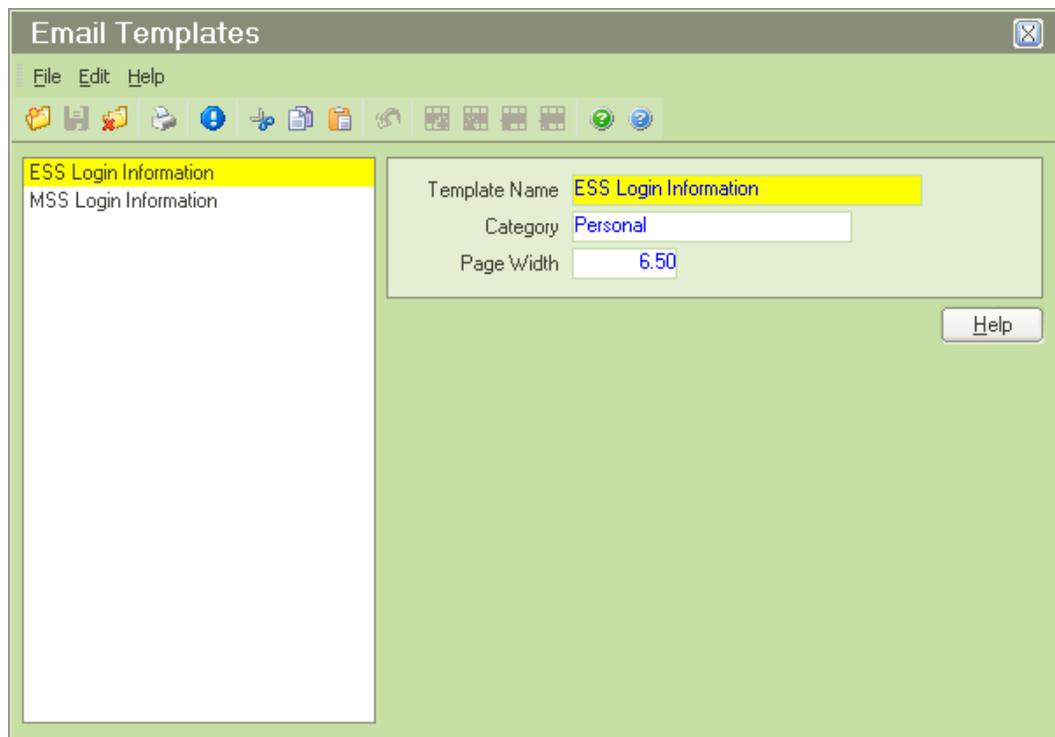
# Email Templates

Within People-Trak, a document is defined as a template (or document design) and a query. The template determines what the document looks like and the query determines which records are to be included. Depending on the type of document, the template may be created separately from the query or at the same time.

An email template is merged with a record or record group to create a specific group of emails. The same email template can be used over and over with different record groups to produce any desired group of emails.

## Email Templates Screen

When the Email Templates option is selected on the Templates menu, Email Templates screen is displayed.



- Template Name**      The name of the template. It is used to identify the template in the Explorer and when templates are selected for emails.
- Category**            The category into which the email template is to be placed. This category can be used to secure email templates. A table that contains all of the existing organizer categories for the current module supports this field. You can only select a valid entry from the table.
- Page Width**         The width of the page in inches.

### Button Functions

- Help**                    Allows you to edit the help for the current email template.

## Email Template Editor

Use the Edit Template option on the File menu or the Edit Template button on the Tool Bar to access the Email Template Editor, which uses the standard Text Editor interface.

## Working with Images

### Inserting an Image

Placing images in the Text Editor is quite simple. Use the Insert Picture option on the Insert menu or the Insert Picture button on the Tool Bar to activate the Select File popup. Use the Select File popup to locate the desired image file. When a file is selected, the image will be returned to the editor at the location of the cursor.

### Moving and Sizing an Image

Images can be moved and sized using the mouse. To move the image, simply click on the image and drag it to wherever you want. To size the image, click on the image and then click on any of the drag handles and drag in any direction.

### Deleting an Image

An image can be deleted like any other character. Select the image by clicking on it. Then, press the DELETE key to delete the image.

## Working with Merge Fields

With the Email Template Editor, you can merge fields from the database with the text of your template to create powerful documents. When you generate an email the actual values from the database are substituted in place of the merge fields and you have a document specific to the employee, applicant, etc., for whom it was produced.

### Inserting a Field

You can insert any field from the database into any location in the template. Simply click in the desired location and then use the Insert Field option on the Field menu or the Insert Field button on the Tool Bar.

Field Name	The name of the field to be inserted at the current cursor location. This field is supported by the Select Field popup, which lists fields by category as well as system and note fields.
Row Modifier	The row modifier to use for this field. When fields are added from grid-style screens, you may wish to list multiple fields in a table that simulates the grid-style screen. To identify the particular row, enter the row number as the modifier. The Select Row Modifier screen shows codes 1-10, but higher row numbers can be manually entered as well. You can take advantage of the Autoset feature by leaving this field blank.
	In a few places in People-Trak, there are one-to-many-to-many data relationships. For example, on the Benefits screen, a plan in the Benefit Plan Enrollment grid can have multiple enrolled dependents in the Enrolled Dependents grid. If you want to do a benefits form for an employee listing the enrolled plans including dependents in each plan, you not only need to specify the row modifier for the plan, but also the row modifiers for the dependents in that plan. When inserting a field in a template, you now have the ability in the Row Modifier field to put in <i>Row.SubRow</i> . For example, if you wanted to see the dependents in the first benefit plan, you would insert fields with a row modifier of 1.1, 1.2, 1.3 and so on.

**Field Modifier** The field modifier for this field. Field modifiers are used to return a portion of the actual field. For example, with date fields, you can return the month, day, or year portion of the date rather than the whole date. Field modifiers can be used in conjunction with row modifiers. If you request a range of salary dates and then request to see only the month of the salary date, the month of the salary date for the range of dates is returned.

## Deleting a Field

A field that has already been inserted can be deleted at any time. Please note that if you actually wish to change the field, you do not need to delete the field and then add the desired one. You can change the field directly using the procedure described in the next section.

To delete an existing field, use the procedure that follows.

1. Using the mouse, select the field to be modified by clicking on it.
2. On the Field menu, select Delete Field to delete the field.

The field will be removed from the editor screen.

## Changing a Field

A field that has already been inserted can be changed at any time. Use the procedure defined below.

1. Using the mouse, select the field to be modified by clicking on it.
2. Activate the Field Settings screen by double-clicking the selected field or selecting the Change Field option on the Field menu.
3. The Field Settings screen can be used to change either the field or the modifiers. Change as desired and click OK to save the change or click Cancel to close the screen without making a change.

## Identifying Existing Fields

Due to their length, field names are not actually entered into the document itself. Instead, a placeholder ~F~ is used. You can identify any single field by double-clicking on the field. The current field name and modifiers are displayed.

You can identify all of the fields in the document at one time using the Show Fields option on the Field menu. This option will substitute the database field name for each of the ~F~ placeholders on the screen. You can use the Show Fields option again to restore the ~F~ placeholders. If you save a document with the field names displayed, the document will be saved correctly, without the field names.

**Before**

```

~F~

~F~
~F~
~F~
~F~

Dear ~F~,

Congratulations! You have reached a major milestone in your career with ~F~: five
years of continuous employment. In this day and age, we salute your commitment and
staying power.
    
```

**After**

```

SYS_DATE

Name_Full
ADDRESS_1
ADDRESS_2
CityStateZip

Dear NAME_FIRST,

Congratulations! You have reached a major milestone in your career with
SYS_COMPANY: five years of continuous employment. In this day and age, we salute
your commitment and staying power.
    
```

**Previewing the Document with Fields Substituted**

When you are building a document with merge fields, you may wish to see what the document would look like when data is actually merged. On the File menu, select Preview or on the Tool Bar, click Preview. When this option is used, each field is filled with a string of “X” characters that is as long as the maximum number of characters allowed for the field. This will assist you in determining if you left enough space between columns and tabs. If the “X” characters overlap between two fields, it is possible that the fields are too close.

```

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Dear XXXXXXXXXXXXXXXX,

Congratulations! You have reached a major milestone in your career with
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX: five years of continuous
employment. In this day and age, we salute your committment and staying power.
    
```

If Preview is active and you use Preview again, the “X” characters will be removed and the template restored. If you save a document with Preview active, the document will be saved correctly, without the “X” characters.

## System Category

When inserting fields into a template, there is a System category provided on the Select Field popup screen. This category includes a list of the system variables that can be inserted. There are three types of fields in this category: company system variables, other system variables and user variables.

## Company System Variables

The company related fields entered with the Enterprise Setup or Company Setup processes can be entered into documents using the variables listed below. When a document is printed, the data actually substituted will be for the currently active company.

- Company Address 1
- Company Address 2
- Company City
- Company Fax
- Company Logo
- Company Name
- Company State
- Company Telephone
- Company Website
- Company Zip
- Federal Tax ID
- Local 1 Tax ID
- Local 2 Tax ID
- Other 1
- Other 2
- Other 3
- Other 4
- State Ta

## Other System Variables

System Date	Substitutes the current date in business letter format. For example, 12-01-2002 is substituted as December 1, 2002.
System Time	Substitutes the current time.

## User Variables

The follow variables are taken from the similarly named fields that are maintained in the User Setup process. These variables reflect the currently logged in user. This is useful when the same document is to be used by multiple users, but is to be signed by the user actually producing the report. The name of the user actually producing the particular letter is substituted into the document.

- User Email
- User Extension
- User Fax
- User Name
- User Signature
- User Telephone
- User Title

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# Lesson 1

## Email 1

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This lesson describes how to use the email feature provided with People-Trak to send emails to individual records and to record groups. It also demonstrates how to create email specifications.

### Tutorials

**Sending an Email to the Current Record:** shows how to send an email to the person associated with the record currently being edited.

**Sending Bulk Email:** demonstrates how to send bulk email to the group of records currently selected.

**Creating an Email Specification:** shows how to create an email specification, which allows you to send an email outside of a record group and use the specification again later.

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## Tutorial 1.1 – Sending an Email to the Current Record

There are two ways to send an email to the person shown in the current record. We'll try both.

We are going to demonstrate including an attachment in our first email. In order to do that, we need to specify the file that we need to attach in the Email Attachments process. The pre-defining of attachments in the Email Attachments process is useful for attachments that are going to be used repeatedly and is required for emails sent as part of triggers.

1. Start People-Trak by double-clicking on the **People-Trak Trainee** icon on your desktop (or as instructed).

The Select Product Option screen is displayed.

2. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the **Training** button to select them.
3. Click OK

The Login screen is displayed.

4. In the **User ID** field, enter **DEMO**.
5. In the **Password** field, enter **DEMO**.

The Organizer desktop is displayed with the Personnel Management module selected.

6. On the **Administration** menu, select **Email Attachments**.
7. On the **File** menu, select **New Email Attachment** or on the Tool Bar, click the **New Email Attachment** button.

A new email attachment is created.

8. In the **Attachment Code** field, enter **EMPINFO PDF**.
9. In the **Description** field, enter **Employee Information Form**.

The Attachment Type field is used to select the type of attachment you want to attach. This can be an archived document or any PDF file to which you have access.

10. Leave the Attachment Type field set to File.
11. Click the **Attach File** button.

The Select File screen is displayed and you can select any PDF file to which you have access. For our example, let's use the Employee Information form.

12. Select the file named **EMPINFO.PDF** in the **PT9\SAMPLES** directory of your local People-Trak drive.

The Attachment check box is automatically selected for you now that you have attached the file and is display only. The Attach File button is no longer available.

The Encrypt on Send check box allows you to specify whether or not you want to encrypt the document when sending it via email. Encryption is recommended for a document with sensitive information on it. If this check box is selected, the document will be encrypted and password protected when attached to an email. The recipient will receive an email informing them of the password for the document that is sent in a separate email. Let's go ahead and encrypt this document.

13. Select the **Encrypt on Send** check box.

14. Close the **Email Attachments** screen, saving your changes.

Now we are ready to create the email.

15. Open **Donald Stern's** record.

Now, here is the first method.

16. Click in the **Email** field.

Note that a popup button is displayed to the right of that field.

17. Click the popup button to start the email process.

The Send Email screen is displayed with the Recipients tab showing. The To Address Type field is defaulted to Address Book, and the email address for Donald Stern is placed in the To field automatically.

18. In the **To Address Type** field, click the popup button.

The Select Email Address Type screen is displayed, which lists the different address types you have to choose from. The Address Book type allows you to use the Address Book button to select from many different email sources from throughout People-Trak. The Address Book type also allows you to manually add email addresses. The Org Chart and Position types allow you to choose from the supervisor chain and list of positions, respectively. Once you have chosen an address type, the To field's popup button gives you the associated choices.

19. Click **OK** to keep the type set to **Address Book**.

Since we are using the Address Book type, you can add an email address by using the Address Book button. You can also manually add email addresses to the To field by separating each email address with a comma.

20. Click the **Address Book** button.

The Email Source screen is displayed with the source set to Employee and all employees with an email address listed in the pane on the right. As you can see, you have a lot of sources from which to choose.

21. Select **HR User** in the list of sources on the left.

The pane on the right now displays all HR Users with an email address.

22. Highlight **Arthur J. Brown** in the list on the right and then click **OK** to select his email address.

You are returned to the Send Email screen. Arthur's email address is added to the end of the To field, separated by a comma. You could continue to add to the To field by using the Address Book button or manually typing email addresses.

**Note:** With the Org Chart and Position address types, you can only have one valid entry in the distribution.

23. In the **CC Address Type** field, click the popup button.

As you can see, you have the same choice of address types for the carbon copy fields.

24. Select **Address Book**.

This time, we will manually type in an address.

25. In the **CC** field, enter **carboncopy@copy.com**.

We will leave the BCC Address Type and Blind CC fields blank. You would select and enter those just like the To and CC fields.

26. Click the **Message** tab.

This tab is used to specify who the email is from and what the message is. We will learn more about the Email Definition field in a bit, so we will leave it blank.

The From Address Type field is defaulted to Address Book and the From field is defaulted to your user's (Timothy Carpenter's) email address.

27. In the **From Address Type** field, click the popup button.

Once again, you have the same choice of address types.

28. Click **OK** to keep the type set to **Address Book**

You can change the From field if you choose. We will leave it set to Timothy's email address.

29. Leave the **From** field set to **tcarpenter@zti.com**.

30. In the **Subject** field, enter **Sample Attachment**.

The Template field is used to enter an existing email template to use for this email. You will learn about email templates in the next lesson. In our example, we will be using simple message text, so we will leave the Template field blank.

31. In the **Text** field, enter the following text:

**Sample email with attachment.**

Note that the Add Closing button is available while you are in the Text field. This allows you to add a closing to your emails, such as your name and title. The closing is specified in User Setup, and the DEMO user does have the name and title for a closing. Let's give it a try.

32. Click **Add Closing**.

A blank line is added and Timothy Carpenter's name and title are added to the email text.

33. Click the **Attachments** tab.

This tab is used to specify the attachments for the email. You can also choose to add the email and any attachments to the notes of the record associated with each email address in the To field.

34. In the **Attachment 1** field, click the popup button.

The Select Email Attachments screen is displayed, which lists all of the email attachments you have created in the Email Attachments process.

35. Select the **EMPINFO PDF** attachment you created earlier.

The Encrypt 1 check box was defaulted to selected when you chose the attachment you created earlier. This is because we chose the Encrypt on Send check box when creating that attachment. You can still choose to deselect that check box on a per email basis. We will leave it selected.

There is also a File Search button available for use when in the Attachment 1 or 2 fields. This can be used to select any file to which you have access. If you want to limit attachments to only those that you have specified in the Email Attachments process, you can turn off access to this button for a user in Security Setup.

Let's attach a file this time.

36. In the **Attachment 2** field, click the **File Search** button.

The Select File screen is displayed.

## 37. Select any non-PDF file.

38. Try to select the **Encrypt 2** check box.

You cannot. Only PDF files can be encrypted.

39. Click in the **Attach Document** field.

The File Search button is now disabled.

## 40. Click the popup button.

The Select Document screen is displayed, and you can select from any People-Trak document in the current module.

## 41. Select any document.

42. In the **Group Type** field, click the popup button.

The Select Record Group Type screen is displayed.

43. Current Group will show the information for the current record group on the document; Current Record will show only the current record's information on the document. A group type of Use Query allows you to use the query from the document to determine the records to use for the document. Choosing the current record or current group ignores the document's query.

44. Click **OK** to keep the type set to **Use Query**.

When we send our email, the People-Trak document will be generated and attached as a PDF file. As a result, it can also be encrypted. In the properties for a document, you can specify that you want encryption by default. The Encrypt Document check box will be defaulted accordingly here, but you can change it.

45. Select the **Encrypt Document** check box.

If the Add Email to Notes check box is selected in Module Setup for the current module, the Add Email to Notes check box is defaulted to selected, which should be the case for us.

46. In the **Add Email to Notes** field, verify that the check box is selected.

This means that this email and any attachments will be added to the notes of the record associated with each email address in the To field. We'll see how the note is created in just a minute.

The Note Category field in an email defaults to the category specified in Module Setup for the current module. You have the option of leaving that Module Setup category blank, which will require the user to select the appropriate category when sending an email. People-Trak is shipped with that default category set to User, so the Note Category in your email will be set to User as well.

47. In the **Note Category** field, use the popup button to select the **Status** category.

This is the category into which the note will be placed.

48. Click the **Send** button to send the email.

A simulated email message will be displayed. (In a production environment, the email will actually be sent.) Since we encrypted our attachments, this is the first email giving the passwords for each of those attachments.

49. Click **OK** to clear the message.

Another simulated email is displayed. This is the regular email that is sent with the message and attachments.

50. Click **OK** to clear the message.

That's how you send an email to an employee (or applicant) directly from an email field.

Here is another way to send an email to the current record. We'll stay in **Donald Stern's** record to save time.

51. On the **File** menu, select **Send Email** or on the Tool Bar, click the **Send Email** button.

The Send Email screen is displayed with Donald Stern's email address preset in the To field, just as before. From this point, sending an email is the same as just described and so we'll just close the screen without sending the email this time.

52. Close the **Send Email** screen.

Now we have to find out what happened with the note. When we sent that email, we asked for a note to be created in Donald's Status category. We also emailed an attachment. That should also be part of the note.

53. The Status screen has a category of Status, so we will move to that screen and show the category notes.

54. In the **Screen** dropdown, select **Status**.

55. On the Category Bar, click the **Category Notes** button.

You should see that three notes were created with today's date and a Type of PDF. A note was created for each attachment.

56. Click in the row for the first of our notes. Click the **Show** button.

The first attachment will be opened.

57. Close the attachment and the **Notes for Status Category** screen.

58. Close **Donald's** record.

A note is added to the record associated with each email address in the To field. Notes are not created for records associated with the email addresses in the CC and BCC fields. If you are in a module whose key record does not have an email address associated with it, the record cannot have a note attached to it. For example, if you are in the Training Course module, the key record is the training course, which of course is not a person that can receive an email. Also, if one of the To recipients does not have a People-Trak record associated with it, such as in the case of a vendor, then no record exists to have a note attached to it.

59. Continue with the next tutorial.

## Tutorial 1.2 – Sending Bulk Email

1. Now, let's send an email to a group.
2. Click the **Open Employee** shortcut to start the **Lookup** process.
3. In the **Last Name** field, enter **B**. Click **Search** and then click **OK**.

This will open a record group of employees with last names that start with **B**.

4. On the **File** menu, select **Send Email**.

The Send Email screen is displayed with the To Address Type field defaulted to Address Book and the email address of the current record defaulted in the To field.

5. Click in the **To** field, which will activate the **Address Book** and **Group** buttons.
6. Click the **Group** button.

The To field is updated to include all of the email addresses for the records in the current group, in alphabetic order. If an employee record does not have an email address, that employee will obviously not be included. Once the remaining fields of the Send Email screen are completed, the email can be sent to each address in the list. If you have specified an attachment file, the file will be sent to each email address. If you have indicated that a note is to be created, a note will be created for each record for which an email address exists. If you have entered CC or Blind CC addresses, those persons will receive a copy of each email sent to the email addresses in the To field.

**Note:** Email distribution fields have a limit of 8000 characters. This maximum should rarely be reached, but if it does, the distribution list will be truncated at that point. You will need to break the group up into smaller groups in this case.

For sake of time, we will just enter a Subject and Text to show how this works.

7. In the **Subject** and **Text** fields, enter **Bulk Email**.
8. Click **Send**.

A simulated email message is displayed for the first email address in the list.

9. Click **OK** to close that message.

Another simulated email message is displayed for the second email address in the list.

10. Click **OK** to close that message and repeat this for each remaining message.

A separate email was sent for each email address, so the recipients do not know who else received that message. This is also why the CC and Blind CC addresses will get a separate email for each To email address as well.

11. On the Tool Bar, click the **Open Employee** button to start the **Lookup** process.

Let's create a record group that contains all of the employees who do have email addresses.

12. On the **Custom** tab, enter the following:

<b>Field Name</b>	<b>Email</b>
<b>Operator</b>	<>

13. Click **Search**.

The same list of records shown on the Send Email screen is displayed. It is not necessary to pre-select only those records that have an email address before sending emails, but this is the method for determining the records that will receive an email prior to the email being sent.

14. Cancel the lookup.

**Note:** Using an “operator” is just a preview of the extensive ability to query within People-Trak. Remember that you can modify the records in the group after the group has been created using the Edit Lookup option on the File menu or Tool Bar.

15. Continue with the next tutorial.

## Tutorial 1.3 – Creating an Email Specification

We have seen how to send an email from within a record group. You can also send an email without having to be in a record group by creating an email specification, which also allows you to use that specification again later.

1. On the **Documents** menu, select **Email**.

The Explorer for emails is opened. It operates like the one used for other documents.

2. On the **File** menu, select **New Email** or on the Tool Bar, click the **New Email** button.

The Email screen is displayed. A new email specification has been created in the <Blank Category> category.

The Specification tab is used to define basic information about the email as well as specify the recipients. The Query tab contains the standard query grid to determine for whom the email specification is going to be sent. The Message and Attachments tabs are identical to the ones you just used in the Send Email screen from within a record. Let's send an email about a manager meeting to all managers.

3. In the **Email Name** field, enter **Manager Meeting**.
4. In the **Explorer Category** field, enter **Meetings**, overriding the table.
5. Leave the **Category** set to **User**.
6. In the **To Address Type** field, click the popup button.

The Select Email Address Type screen is displayed, but now the Field Substitution type is available as well. This allows you to choose the email field you want to use to determine who the email should go to. Let's see how this works.

7. Select **Field Substitution**.
8. In the **To** field, click the popup button.

The Select Email Fields screen is displayed and shows all of the email fields in the current module.

9. Select **Email**, which is the main email address.
10. Click the **Query** tab.

You learned about the ins and outs of this Query grid in the Query and Reporting class. Basically, the Query tab allows you to use any of the fields in the current module to select records. In our case, we are going to select everyone that is a manager and then use the email addresses in the Email field of those records as our distribution list.

11. In the first row of the grid, enter **Manager** in the **Field Name** column.
12. In the **Operator** column, enter =.
13. In the **Contents** column, enter **Y**.

14. Click the **Message** tab.

The From Address Type and From fields are defaulted as before.

15. Leave the **From Address Type** and **From** fields as defaulted.

16. In the **Subject** field, enter **Manager Meeting Tomorrow**.

Like other emails, you have the option of using a template or just message text. We will enter message text.

17. In the **Message Text** field, enter:

**There is a manager meeting tomorrow at 10:00 AM in the Conference Room. Please get all your agenda items to me by 3 PM today.**

We won't bother with attachments or notes since you have learned about those already.

Now that we have specified to whom the email should go and the message, we are ready to send the email.

18. On the **File** menu, select **Run Email** or on the Tool Bar, click the **Run Email** button.

A simulated email message is displayed for every record that qualified in the query, and the To address is the email address in the Email field of that record. In a production environment, the email will actually be sent.

You can use this email specification again later and send it as is or make changes to the contents of the email or to the query.

19. Close the **Email** screen, and close the **Explorer**.

20. This concludes this tutorial and lesson.

# Notes

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# Lesson 2

## Email 2

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### Lesson Contents

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This lesson covers how to create email templates and definitions. It also covers how to define email distribution lists for a document.

### Tutorials

**Email Templates:** shows how to create email templates, which allow you to create mail-merge documents that become the body of the email.

**Email Definitions:** shows how to create an email definition and then use it when sending emails.

**Email by Type:** demonstrates how to define an email distribution list for a document.

**Email by Favorite:** demonstrates how to use lookup favorites to create a dynamic email distribution list for a document.

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## Tutorial 2.1 – Email Templates

Email templates allow you to create mail-merge documents that become the body of the email. Now instead of having a fixed email message, you can use field substitution and create email messages that contain any information from an employee, applicant, or position record. Not only can this be used to personalize the email, it can be used to provide information relevant and/or necessary for a decision making process. Let's make and test an email template now.

1. On the **Templates** menu, select **Email Templates**.
2. On the **File** menu, select **New Template** or on the Tool Bar, click the **New Template** button.
3. In the **Template Name** field, enter **Welcome Email Template**.
4. In the **Category** field, select the **Personal** category.

The Page Width is defaulted to 6.50 inches and can be changed if needed.

5. On the Tool Bar, click the **Edit Email Template** button to start the template editor.

The Email template editor is very simple and provides very few options. The reason for this is that email templates are text based. Due to security reasons, the body of emails is best created without formatting or special HTML features. Otherwise, many of the emails will be blocked by spam filters.

A powerful feature that is available is field substitution. You can select any field from within the current module and substitute that field into the email text.

For our example, let's create a simple "Welcome Aboard" email. Like with the other templates, use the Insert Field feature to create the ~F~ placeholders as instructed below.

6. Enter the following text:

**Dear ~F~ (insert employee First Name),**

**On behalf of the Human Resources Department, it is a privilege to extend a cordial "Welcome Aboard" to ZTI. I think you'll find your work experience here to be both fulfilling and enjoyable.**

**If you have any questions about your new assignment, please feel free to ask any of us. We are here to serve you.**

**Sincerely,**

~F~ (insert User Name from System category)

~F~ (insert User Title from System category)

7. Close the **Email Template Editor**, saving your changes. Close the **Email Templates** screen, saving your changes.

Now let's assume that Donald Stern is a new employee and we wish to send this email to him.

8. Open **Donald Stern's** record.
9. In the **Email** field, click the popup button to display the Send Email screen.
10. Click the **Message** tab.
11. In the **Subject** field, enter **Welcome Aboard!**
12. In the **Template** field, click the popup button to display a list of email templates. Select **Welcome Email Template**.

This template will be used for the body of the email.

13. Try to type something in the **Text** field.

You cannot, because you already entered a template. As the 'Or' on the screen between the Template and Text fields indicates, you can use a template or enter text, but not both.

14. Click **Send** to send the email now.

When the email simulation is displayed, note that the placeholders for First Name, User Name and User Title have been updated with the appropriate information.

An email template can be specified whenever the Send Email screen is displayed. This includes when reports are printed and alerts are generated. If the To list in the email includes more than one address, the template is updated for each applicable record. An email address may not have an applicable record in the case where the email address is not for a person tracked within People-Trak. For example, if you send an email to an employee of your benefits carrier, People-Trak cannot substitute employee information because the person will not have an employee record within People-Trak.

15. Close **Donald Stern's** record.
16. Continue with the next tutorial.

## Tutorial 2.2 – Email Definitions

If you have emails that you will send on a regular basis, it would be nice to have a way to save that definition so you can reuse it. People-Trak allows you to do just that. Let's continue with our example from the last tutorial. When you hire a new employee, you might want to send a Welcome Aboard email and also include a policy manual as an attachment. We will create an email definition to do just that.

First, let's update our email template to mention the policy manual that will be attached.

1. On the **Templates** menu, select **Email Templates**.
2. Select the **Welcome Email Template**. On the Tool Bar, click the **Edit Email Template** button to start the template editor.
3. At the end of the first paragraph, add the following text:

**The company policy manual has been attached for your reference.**

4. Close the template editor, saving your changes.
5. Close the **Email Templates** screen saving your changes.

In order to use an attachment in our email definition, we will need to create that attachment using the Email Attachments process.

6. On the **Administration** menu, select **Email Attachments**.
7. On the **File** menu, select **New Email Attachment** or on the Tool Bar, click the **New Email Attachment** button.

A new email attachment is created.

8. In the **Attachment Code** field, enter **Policy Manual**.
9. In the **Description** field, enter **Policy Manual**.
10. Leave the **Attachment Type** field set to **File**.
11. Click the **Attach File** button.

The Select File screen is displayed and you can select any PDF file to which you have access.

12. Select the file named **POLICY.PDF** in the **PT9\SAMPLES** directory of your local People-Trak drive.
13. Close the **Email Attachments** screen, saving your changes.
14. On the **Administration** menu, select **Email Definitions**.

The Email Definitions screen is displayed. It includes the same Message and Attachment tabs and fields that you have seen before when sending an email. What you enter here can be used as a default in the many methods of sending email in People-Trak.

15. On the **File** menu, select **New Email Definition** or on the Tool Bar, click the **New Email Definition** button.

16. In the **Definition Code** field, enter **Welcome Email**.

We would like this email to always come from the Human Resources Generalist.

17. In the **From Address Type** field, select **Position**.

18. In the **From** field, click the popup button.

The Lookup Position screen is displayed.

19. Click **Search**.

20. Select **1043 - Human Resources Generalist**.

The position number for the HR Generalist is returned to the From field. The email address for the employee currently in that position will be derived at the time the email is sent, and the email will be sent from that address.

21. In the **Subject** field, enter **Welcome Aboard!**

22. In the **Template** field, click the popup button to display a list of email templates. Select **Welcome Email Template**.

23. Click the **Attachments** tab.

24. In the **Attachment 1** field, use the popup to select the **Policy Manual** attachment.

25. Select the **Add Email to Notes** check box. In the **Note Category** field, select **Status**.

Our definition is ready to use.

26. Close the **Email Definitions** screen, saving your changes.

27. Open **Donald Stern's** record.

28. In the **Email** field, click the popup button to display the **Send Email** screen.

Our email is already addressed to Donald.

29. Click the **Message** tab.

30. In the **Email Definition** field, click the popup button.

The Select Email Definitions screen is displayed.

31. Select your **Welcome Email** definition.

All of the information from the email definition is defaulted in the appropriate fields.

32. Click the **Attachments** tab and verify that the attachment and notes info was defaulted.

You can still update these fields, if necessary. We will leave everything as is.

33. Click **Send**.

The email simulation is displayed. You can see that the From address for the current HR Generalist (Timothy Carpenter) has been used. Your updated information in the template was used and the policy manual attached.

You can now reuse that email definition anywhere that email is sent throughout People-Trak.

34. Click **OK**.

35. Close **Donald's** record.

36. Continue with the next tutorial.

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## Tutorial 2.3 – Email by Type

You can define and save a “permanent” email distribution list for any document. When you output this document to email, the email addresses from the distribution list will be automatically added to the To field when the Send Email screen is displayed. This is a very useful feature when you wish to email a particular document to the same people each time the document is run.

Before we demonstrate this, let’s review what you learned in Query and Reporting about how to email a document.

1. On the **Documents** menu, select **Adhoc Reports**.
2. In the **General** category, select **Alphabetic Employee List** and run it.
3. In the **Document Viewer** Tool Bar, click the **Output to Email** button.

The Output to Email screen is displayed. It is identical to the Send Email screen you used earlier when sending email from within a record.

When you clicked the Output to Email button, the document was output to a temporary file in PDF format.

4. Click the **Attachments** tab.

The Attachment 1 field is set to the path of that temporary PDF file.

5. Click the **Message** tab.

The Subject field is automatically set to the name of the document.

6. Click the **Recipients** tab.

The To field is blank. You can add whatever recipients you choose. At this point, this email is just like the other emails. You just have a document attached for you since you got to this point from the Document Viewer.

7. Close the **Output to Email** screen and the **Document Viewer**.

The Adhoc Reports Explorer is displayed.

Now, let’s learn about how to add an email distribution list to a document.

8. In the **General** category, highlight **Alphabetic Employee List**, but do not select the document for editing. On the Tool Bar, click the **Adhoc Report Properties** button.

The Adhoc Report Properties screen is displayed.

9. Click the **Email** tab.

This tab is used to record the distribution list by entering email addresses by email type and/or using a favorite. It also allows you to choose whether or not you want this document encrypted when sending via email. In this tutorial, we will focus on entering email addresses by email type. In the next tutorial, we will look at using a favorite. The encryption feature was demonstrated earlier in this training.

Let's add the email addresses for three employees to the "permanent" distribution of this document.

10. In the **Email Type** column, click the popup button.

The Select Email Address Type is displayed. The only type that isn't allowed here that was allowed in earlier emails we sent is Org Chart. This is because an employee record is not available when in the Document Viewer.

11. Select **Address Book**.

12. In the **Email Address** column, click the **Address Book** button.

13. Using the **Employee** source, select any employee.

When you are returned to the Adhoc Report Properties screen, that employee's email address is displayed in the Email Address field, which is where the report will be sent.

14. In the **Email Type** column of the next blank row, select **Address Book** and then use the **Address Book** button to select another employee. Follow the same procedure to add one more employee to our list.

15. Close the **Adhoc Report Properties** screen, saving your changes.

16. Run the report.

17. On the **Document Viewer** Tool Bar, click the **Output to Email** button.

The Output to Email screen is displayed with the three email addresses listed in the To field. The To Address Type is defaulted to Address Book.

You have the option of changing the To addresses and adding other email addresses in the CC and Blind CC fields. Let's add to the To addresses so we can demonstrate something new.

18. In the **To** field, add any email address by adding a comma and then typing in that address. Then click the **Address Book** button to select any email address.

That email address is added to the list. As you can see, you can use a combination of methods to add to the To field. The same is true of the CC and BCC fields.

19. Click the **Message** tab.

20. In the **Text** field, add the following text:

**Here is the latest Alphabetic Employee List.**

21. Click the **Send** button to forward the entire report by email to each name in the list.

The email simulation is displayed for each of the names, and you can see that a pdf file including the document has been attached to each email. In production, the email simulations would not be displayed, but the emails would be sent directly to the addresses specified.

22. Close the **Document Viewer** and the **Explorer**. Continue with the next tutorial.

## Tutorial 2.4 – Email by Favorite

In Query and Reporting training, you learned how to create query-based favorites that can be used to look up records for editing or batch processing. These lookup favorites can also be used to create dynamic email lists.

1. On the **Documents** menu, select **Lookup Favorites**.
2. On the Tool Bar, click the **New Lookup Favorite** button to start a new document.
3. In the **Lookup Name** field, enter **Last Name Starts with B** and place the document in any desired **Explorer Category**. Leave the **Category** set to **User**.
4. On the **Query** tab, enter the following query:

**Last Name Starts            B**

5. On the Tool Bar, click the **Run Lookup Favorite** button to test the lookup.

A report is displayed that uses the fields currently specified for employee lookup as the columns. The employees listed should be those employees with a Last Name starting with B.

6. Close the **Document Viewer** and the **Lookup Favorites** screen, saving your changes. Close the **Explorer**.
7. On the **Documents** menu, select **Adhoc Reports**.
8. In the **General** category, highlight **Alphabetic Employee List** but do not select the document for editing. On the Tool Bar, click the **Adhoc Report Properties** button.

The Adhoc Report Properties screen is displayed.

9. Click the **Email** tab.

We can use a favorite in addition to the address list we already have defined, so we will leave our three addresses intact.

10. In the **Favorite Name** field, use the popup button to display a list of the available favorites. The list should include the favorite you just created. Select that favorite.
11. Close the **Adhoc Report Properties** screen, saving your changes.
12. Run the report.
13. On the **Document Viewer** Tool Bar, click the **Output to Email** button.

When the Output to Email screen is displayed, the query associated with the screen is run and a list of those employees with a Last Name starting with B is generated. The email addresses for these employees are automatically placed into the To field for you. In addition, the three ‘by type’ addresses are also in the list. If we did click the Send button, the entire report will be forwarded to each email address in the list.

14. Close the **Output to Email** screen, without sending the emails.

15. Close the **Document Viewer**.

The power of emailing by favorite is that the list is dynamic. It is generated each time the report is run and will always include those persons who meet the query criteria. Let's demonstrate this.

16. Close the **Explorer**.

17. Open the record for **Frank Beyer** and change his last name from **Beyer** to **Meyer**. Close the record, saving that change.

18. Now, return to the Adhoc Reports option and run the Alphabetic Employee List.

19. On the **Document Viewer** Tool Bar, click the **Output to Email** button to prepare the report for email.

The To field list will be shorter by one because Frank Beyer is no longer included in the query because his Last Name no longer starts with B.

20. Close the **Output to Email** screen, without sending the emails.

21. Close the **Document Viewer** and the **Explorer**.

22. Change **Frank Meyer's** last name back to **Beyer**. Close the record, saving that change.

Now is a good time to review all of the options available when emailing a document. If the document has email breaks, each section of the document is automatically emailed to the appropriate email address; the whole document will be emailed to anyone specified in the Output to Email screen. So, it is possible to email a document up to three different ways in one output to email use: using email breaks, specifying an email distribution list in the document's properties and adding additional recipients at the time of output to email.

23. Exit **People-Trak**.

24. This concludes this tutorial and lesson.