

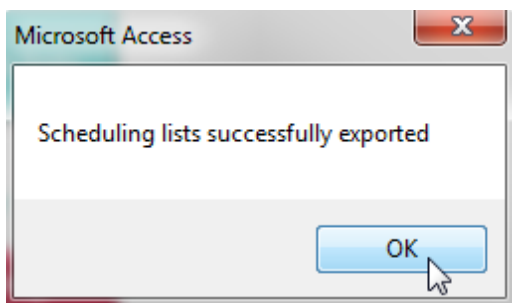
MASS SCHEDULING

Exporting lists and adding schedule attempts

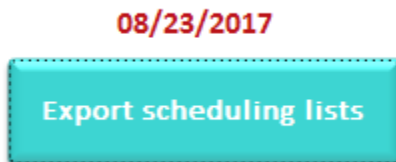
1. Open DAISY Mass Scheduling access database located in: S:\BDC\DAISY\DAISY DATABASE
2. Click on "Export scheduling lists"



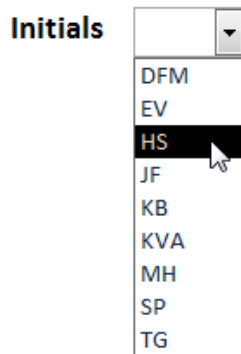
3. A message box will appear, "Scheduling lists successfully exported." Click OK



4. The date above the Export button will change to today's date. The dates above both the export button and the update button will turn red because they no longer match.



5. Select your initials from the drop-down



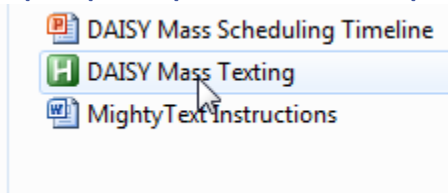
6. Click the button "Update scheduling attempts." Click "yes" twice through the pop-up messages.

7. The date above the “Update scheduling attempts” button will now display today’s date. Both dates should have turned green, meaning that both weekly tasks in the database have been completed: the scheduling list has been exported and scheduling attempts have been added.

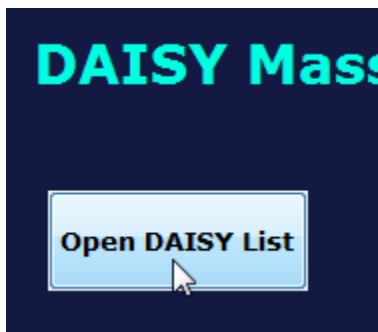
Sending Mass Texts

Refer to the *MightyText Instructions* Word document located in **S:\BDC\DAISY\DAISY DATABASES\Mass Scheduling Documents** for special instructions on opening and using *MightyText*.

1. Double-click on the autohotkey file **DAISY Mass Texting** located in:
S:\BDC\DAISY\DAISY DATABASES\Mass Scheduling Documents



2. Click the button “Open DAISY List”



3. The **DAISY Mass Scheduling Lists** Excel workbook will open. Check the tabs at the bottom –they should be labeled with today’s date.

4. Open *MightyText* and sign into Daisystudycolorado@gmail.com. Click on “New Message.”

5. Open the third tab on the **DAISY Mass Scheduling Lists** Excel workbook, labeled **Text_BeforeDD**.

6. Click in the **To:** section of the New Message, then press **F3 to paste** from the **Text_BeforeDD** tab.

- Check at least the first and last numbers and the numbers count to make sure all of them pasted correctly. If they didn’t all paste in the first time, cut and paste each extra number in individually, hitting “tab” between numbers.
- If you have over 25 numbers, you will need to send the message in more than one batch.

New Message ×

To | [] + []

7. **VERY IMPORTANT!!** Check that the setting under the To: section says **Individually**, indicating that each text will be sent individually and not as a group text. (For additional information, see [MightyText Instructions](#) Word document)

Individually ▼ ?

8. In the bottom right-hand corner of the new message, select the **Insert Template icon**. Then select **DAISY Before Due Date**. The **before due date** wording will appear in the body of the text message.

INSERT TEMPLATE...

- DAISY After Due Date
- DAISY Before Due Date
- TEDDY Spanish
- TEDDY English

Edit templates / signature

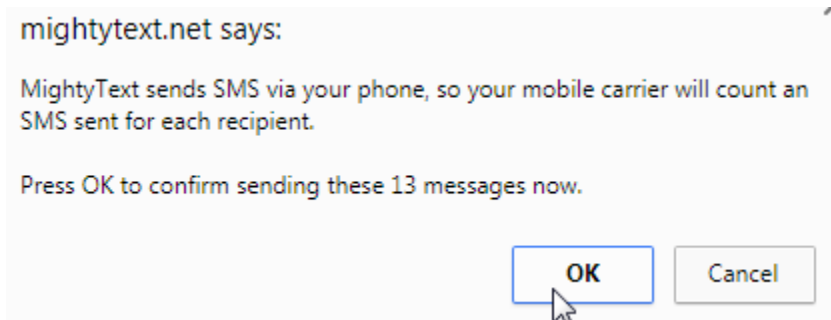
Save as template

← Insert Signature

9. Click the arrow in the bottom right-hand corner to send the message



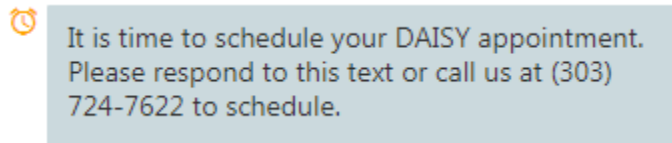
10. If you see the message below, click "OK." The messages will send.



12. Repeat these steps with a new message for phone numbers in the 4th tab on the **DAISY Mass Scheduling Lists** Excel workbook labeled **Text_AfterDD**.

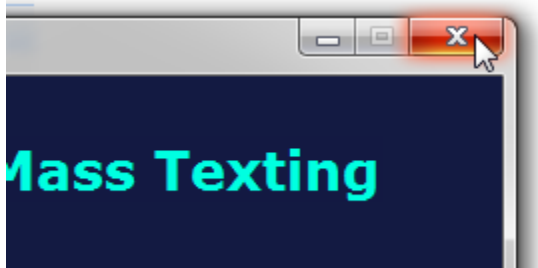
- You will use the shortcut **F4 to paste** phone numbers in and the template **DAISY After Due Date**.
- Be sure to double-check phone numbers and check that the setting is **Individually** before sending.

13. Check the sent messages. If there is a green check or no icon next to the message, it has successfully sent. If there is an orange clock icon next to the message, the message has not sent from the phone yet.



- If any messages have this orange icon, check MightyText again in about half an hour – 45 minutes. If the message still has not sent, copy and paste the message into the space below and re-send. Check again to see if the message has sent. Re-sending a message usually works immediately.
- **Alternate checking method:** Check the **phone** immediately after you send the message, and highlight each successfully sent phone number on the Excel document. The messages on the phone update more quickly than MightyText and are usually in the same order as the Excel sheet, so checking the phone can sometimes be easier, quicker and more accurate.

15. Close the DAISY Mass Texting autohotkey program by clicking on the red X.

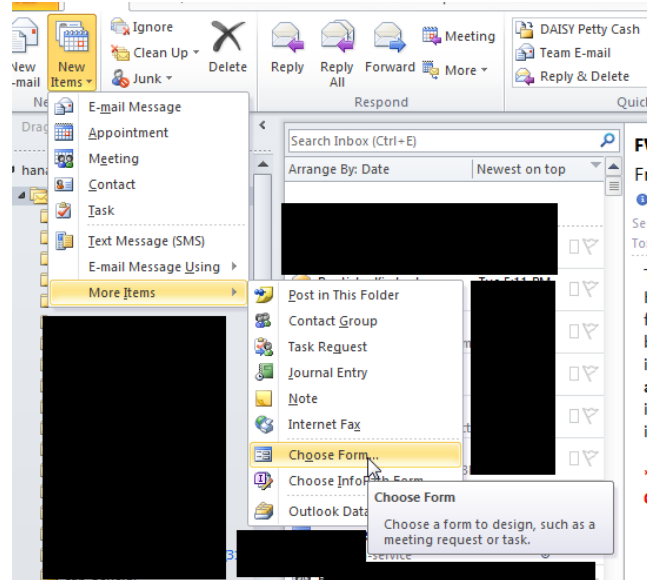


Sending Mass Emails

How to use email template

Note this method will send an email from your personal mailbox, not from BDC-DAISYSTUDY

1. Go to New Items → More Items → Choose Form...

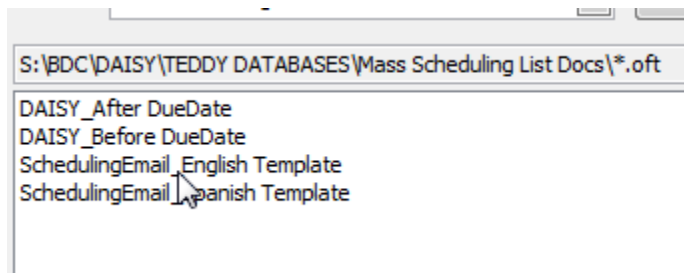


2. For the first time, select User Templates in File System → Browse and look in this file path:

S:\BDC\DAISY\TEDDY DATABASES\Mass Scheduling List Docs*.oft

If you have loaded this before, select "Mass Scheduling List Docs"

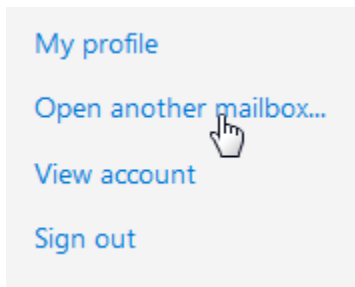
3. Open the correct template from here and return to main instructions.



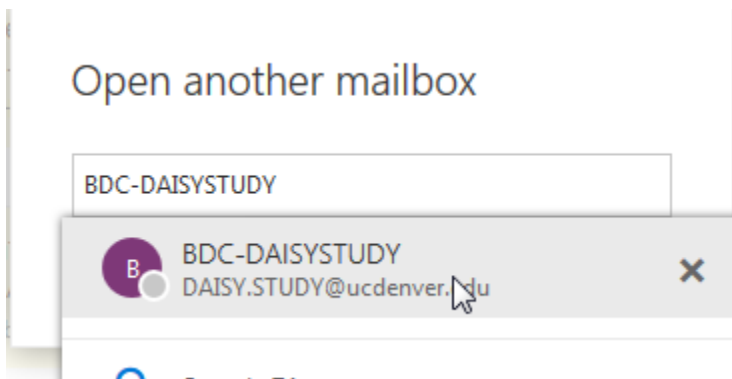
Main instructions (using Outlook webmail):

H:/NIDDK Submission/DAISY MOO_2021

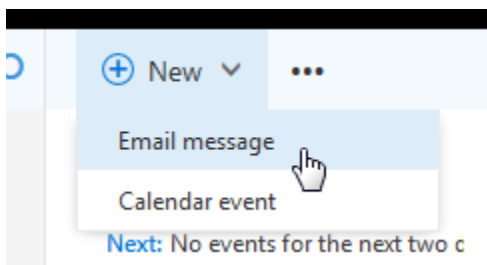
1. Sign into Outlook webmail and click on your name in the upper-right-hand corner. Select “Open another mailbox”



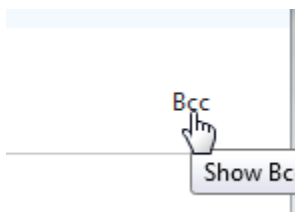
2. Enter **BDC-DAISYSTUDY** in the search box and then click on the mailbox when it appears in the list. Click “Open.”



3. In the upper banner, click “New” and then click “Email message”



4. **VERY IMPORTANT!!** Click “Bcc” in the upper right-hand corner of the email message



5. If the **DAISY Mass Scheduling Lists** Excel workbook is not already open, open it from **S:\BDC\DAISY\DAISY DATABASES\Mass Scheduling Documents**.

6. Open the **first tab** labeled **Email_BeforeDD** . Copy the email addresses in the first tab and paste them **IN THE BCC FIELD** of the new email message.
7. Add a subject line to the email message, "DAISY study"
8. Copy/paste the DAISY email body message for **before the due date**:

It is time to schedule your DAISY appointment. Please respond to this email or call us at 303-724-7622 to schedule.

9. Double-check that all of the email addresses are listed on the **BCC line only**. Click "Send."
10. Return to the DAISY Mass Scheduling Lists Excel workbook **second tab** labeled **Email_AfterDD**. Copy the email addresses in the second tab and paste them **IN THE BCC FIELD** of a new email message.
11. Add a subject line to the email message, "DAISY study"
12. Copy/paste the DAISY email body message for **after the due date**:

You still have time to schedule your DAISY appointment. Please respond to this email or call us at 303-724-7622 to schedule.

13. Double-check that all of the email addresses are listed on the **BCC line only**. Click "Send."
14. Keep email open for a few more minutes in case any email addresses are undeliverable.*

*If you receive a bounced or undeliverable email message, contact that subject using another method and edit their schedule attempt accordingly in the website (you may need to request assistance from data management). Also, be sure to remove the bounced email address from the website.