# Contents

# How to Send Emails to Students Using the Student Communications Tool

## Overview

The Student Communication Tool provides the ability to send quick one-off emails to matriculated students and add it to an archive. While this tool is accessed from Workday Student, it is not a Workday Student function. As a result, a user must first download a list of students whom they wish to email from Workday first, using a variety of available reports, as an .xlsx document, and then upload it to the Student Communications Tool while creating their communication.

The sender will receive one copy of the email to their mailbox automatically as a confirmation.

## Limits

**Maximum Recipients**: The Excel file you upload can include up to 50,000 rows (Header + 49,999 students)

**Character Limit of Email Body**: Approximately 7,500 Characters (with spaces) when typing directly into the composer.

If you are pasting the body of the email from another document, there may be additional layers of hidden HTML coding that use up part of this character limit. An alert will appear if the entered text is over the character limit. It is recommended that email messages are constructed right in the composer of the Student Communications tool.

**Attachment Size:** Files attached to the email must be smaller than 10MB (per file). If a single file exceeds this limit, there will be an error message to remove it.

## Task Instructions

1. Find the List of Students to Email
2. Launch the Student Communications Tool
3. Start New Communication
4. Upload the Student Number(s)
5. Review Upload List to Confirm Valid (Bulk/ Mail Merge Only)
6. Compose the Email
7. Review Recipient List and Email Contents
8. Send Email

# How to Email Students

## Step 1: Find the List of Students to Email

**Option 1: An individual student using a single student number.**

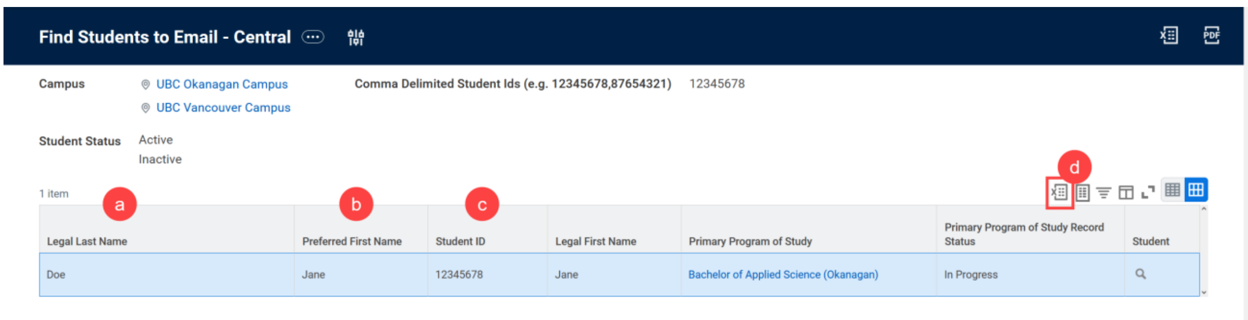
Find the student number for the student to whom you wish to email.

**Option 2: Multiple students using an excel document.**

- Find the students you need to email using existing reports or other data sources
- Copy the student numbers into the **Find Students to Email report**
- Export the **Find Students to Email** report to excel and save to your local drive.

The file must have the following column headings in this order:

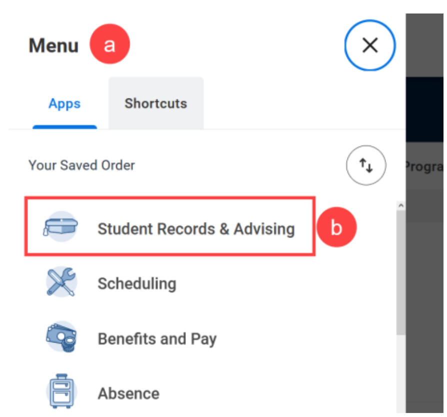
a. Column A: Legal Last Name
b. Column B: Preferred First Name
c. Column C: Student ID



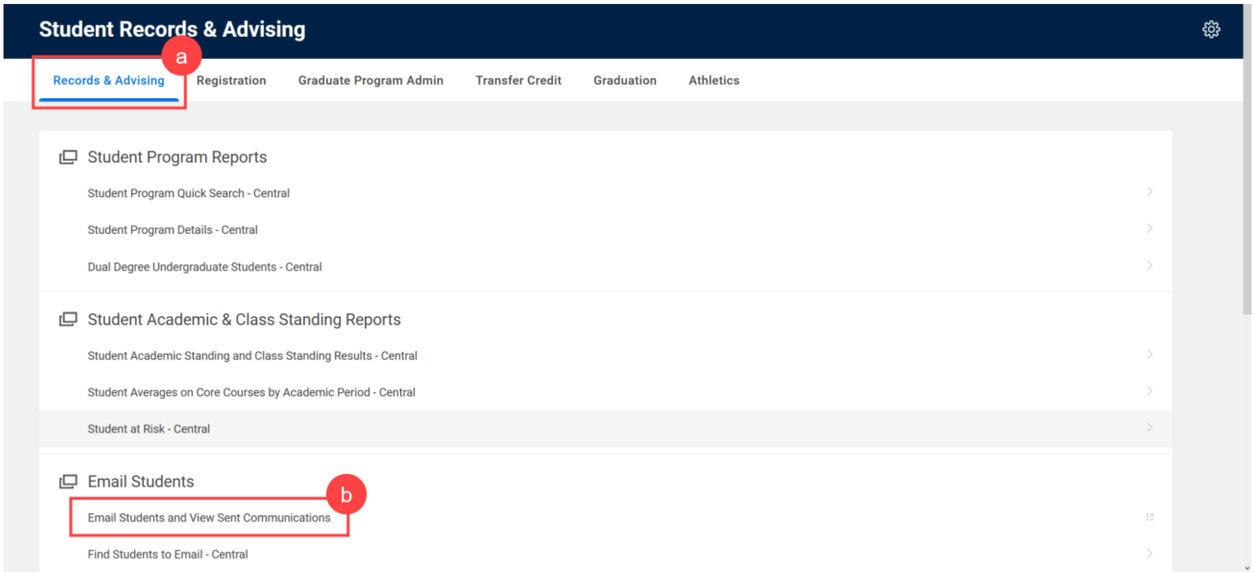

d. Export to Excel and save to your local drive.

## Step 2: Launch the Student Communications Tool

a. Click **Menu** in the top left-hand corner of any Workday Screen
b. Select the **Student Records & Advising** application

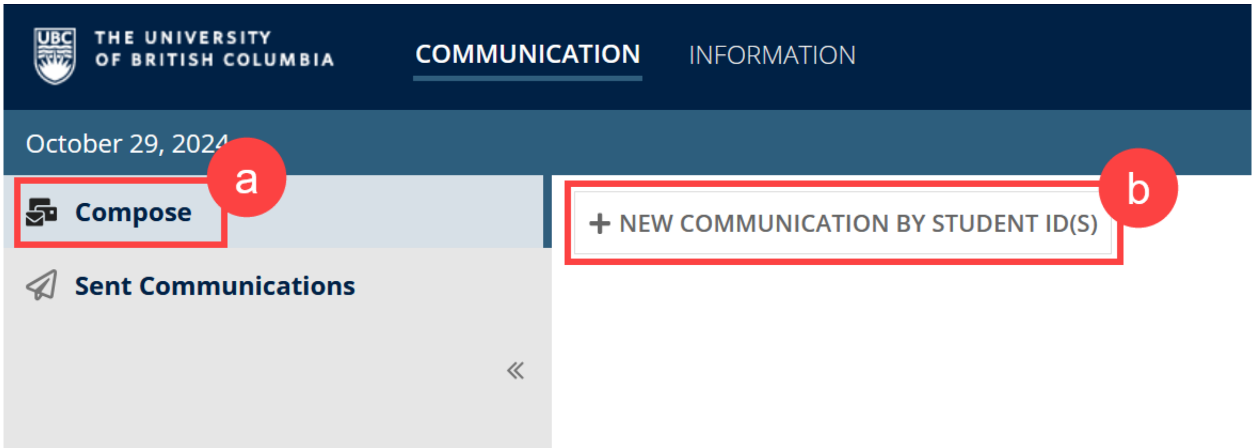


c. The default tab **Records & Advising** will load
d. Under the **Email Students** header, click **Email Students and View Sent Communication** to launch the Student Communications tool (it is recommended you open in a new tab).




## Step 3: Start New Communication

a. Select the **Compose** tab
b. Click **+ NEW COMMUNICATION BY STUDENT ID(S)**



## Step 4: Upload the Student Number(s)

Choose one of the following options.

**a. Single Communication**

This option is used when you only have a single student to email.

Input a single student number. As you enter the number, the system will return a list of students that match the number displaying as “LastName | FirstName | StudentID”. The more specific the number, the more refined the results.

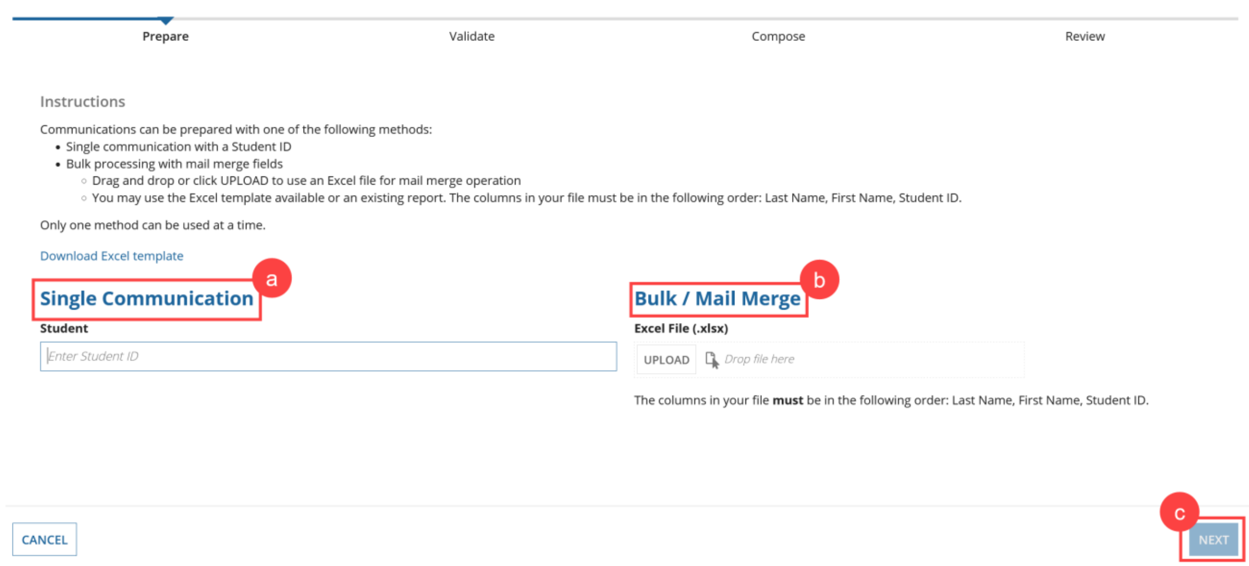

**b. Bulk/Mail Merge**

This option is used when you have more than one student to email (i.e., 2 - 49,000).

Click Upload and select the relevant file OR drag and drop the file in the “Drop file here” box

> Once you’ve selected between Single Communication or Bulk / Mail Merge, the other option will grey out and not be available to select.

**c.** Click **NEXT**.



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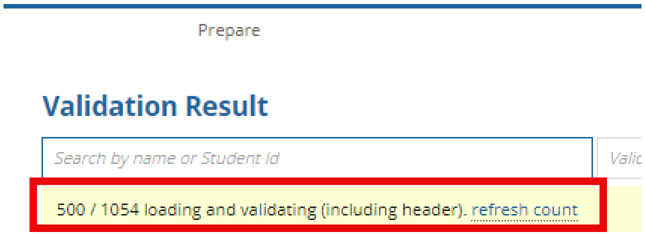
Note: If you have a large file (over 1,000 lines), please be aware that it may take a few minutes to render the list on the following screen. A progress bar will be available.




## Step 5: Review the UBC Tags and Update Mapping (Bulk/Mail Merge Only)

The Student Communications tool has predefined UBC Tags (keywords) to match the columns in the report. These tags include:

- Last Name – Column A
- First Name – Column B
- Student ID – Column C

These tags will be mapped and show the results on the Validate screen. If the system has recognized your tags properly, it will successfully match to a student record. To determine this, verify the status by looking at the Validation column. It will be labelled “Valid” per individual line.

The fields map to columns instead of the column headings. For example, if Student ID is in column A in the file, it will map to Last Name Tag instead the Student ID Tag. Ensure that your file has column headings in the following order.

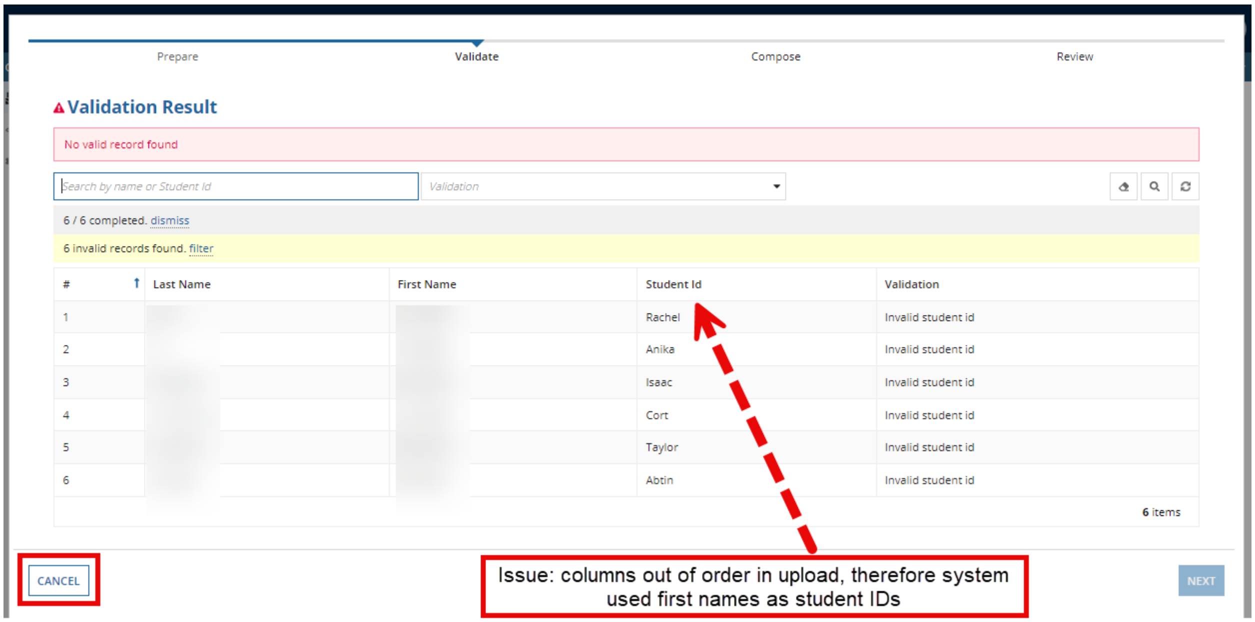
- Column A: Legal Last Name
- Column B: Preferred First Name
- Column C: Student ID

**Resolving Errors**

If there is a problem with the data that was loaded, you will see one of two errors:

1. **No Valid Records Found:**
   This typically indicates that you have not provided the three required column headers and/or they're not in the correct order.

   *Recommendation*: click "CANCEL" and return to the previous screen. Fix your Excel file, and re-upload to start the process again.

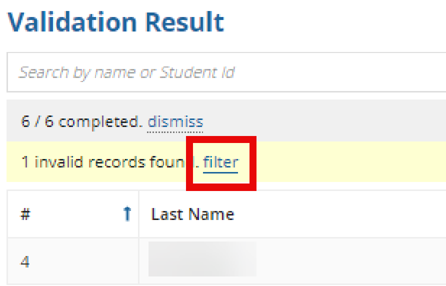



Important: It is required that the order of the column headers matches the sequence above in order to map to the Mail Merge functionality properly. If you have other column headers in your report, please delete those and the corresponding data before attaching the file into the Student Communications Tool. The only remaining columns should be:

- Legal Last Name (column A)
- Preferred First Name (column B)
- Student ID (column C)

2. **Invalid Record Found:**
   This indicates an issue with one or multiple lines in your report. A message will appear at the top of the table stating how many invalid records are found, e.g., "6 invalid records found" with a link to filter. By clicking on this link, the table will automatically filter to the issues.

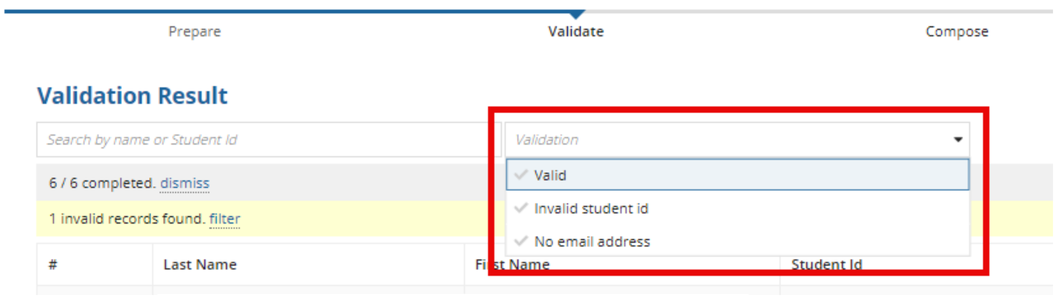
   *Recommendation*: Once you have identified the row(s) where the issues exist and you understand the problem, click **CANCEL** and return to the previous screen. Fix your Excel file, and re-upload to start the process again.



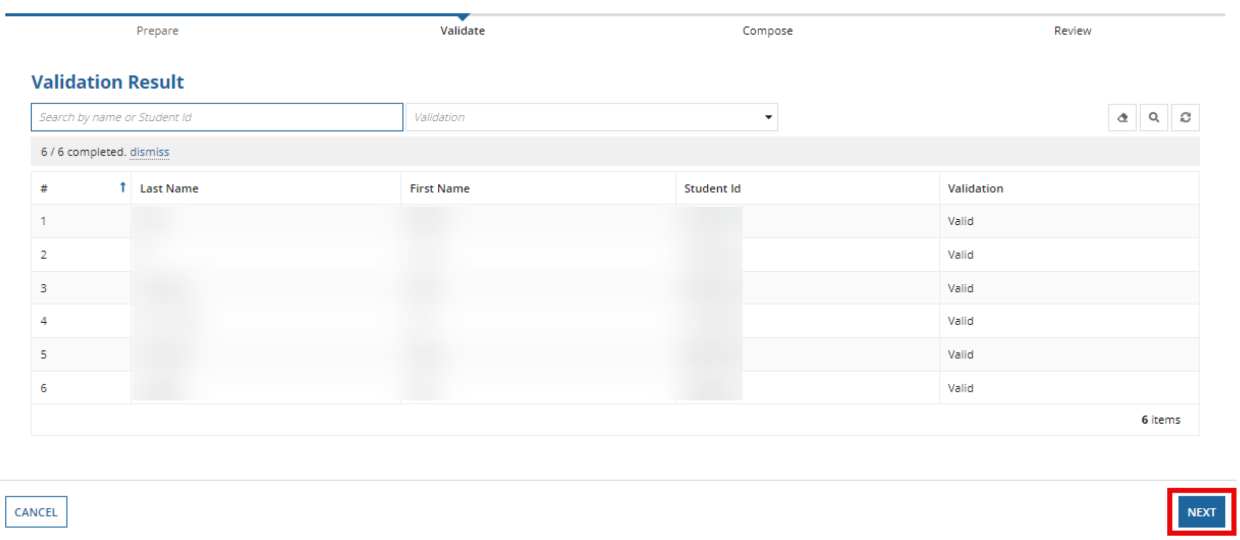

To manually filter your list, click into the Validation drop down box. Three options will be presented:

- **Valid** (found student record with email address)
- **Invalid student ID** (a student ID in your list doesn't match a student record)
- **No email address** (there is no email address associated to this student record)

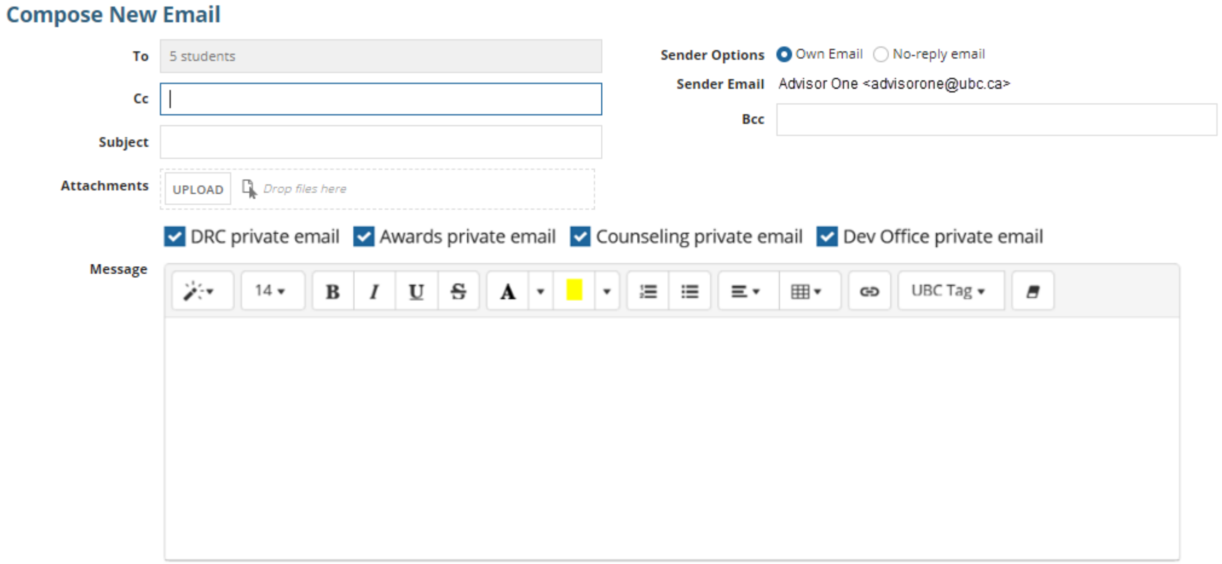
This will be particularly helpful for larger report files that have hundreds or thousands of rows.



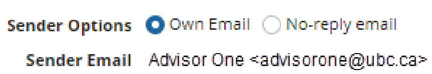

Once you have resolved all errors, click **NEXT**



## Step 6: Compose the Email




The window to compose and send email will open. Find below the description of each field and if it is visible to students.

| Field | Description | Visible to Students? |
|---|---|---|
| **To** | Will display the number of students who will receive the email. | Only own email |
| **Sender Options/Sender Email** | Displayed to the student as the sending email. Will default to user's email but can be updated to a No-Reply email.<br><br> | Yes |
| **Cc** | Free text field to add emails to send a carbon copy. | Yes |
| **Bcc** | Free text field to add emails to send a blind carbon copy. | No |
| **Subject** | Free text for subject of email. | Yes |
| **Attachments** | Ability to upload or drop files from computer files to attach to and support the email message. | Yes |
| **Privacy Tags** | Some users may have access to privacy tags based on their role at UBC. These tags include:<br>DRC private email<br>Awards private email<br>Counselling private email<br>Dev Office private email.<br><br>Note: When selecting a 'private email' checkbox, the email will be logged in Sent Communications but all details, such as subject line and sender, are marked as "Private" and the body of the message will not display for persons not associated with the selected 'Private' group. Only persons associated with the selected 'Private' group would have access to view the details and content of the message. | No |

**Composing the body of the email:**


Compose your email. UBC Tags can be added to personalize elements with the student's information, such as personalizing the recipient's name in the greeting. Rich text formatting can be used as described in the table below. After composing the email, click the "**NEXT"** button to review the information before sending.

| Field | Additional Options | Keyboard shortcut |
|---|---|---|
| **a. Style** | Normal<br>Large Header<br>Medium Header<br>Small Header | N/A |
| **b. Font size** | 10 pt<br>14 pt<br>18 pt<br>32 pt | N/A |
| **c. Text Style** | Bold<br>Italicize<br>Underline<br>Strikethrough | CTRL+B<br>CTRL+I<br>CTRL+U<br>CTRL+S |
| **d. Text Colour** | Any colour | N/A |
| **e. Text Background Colour** | Any colour | N/A |
| **f. Numbered List** | N/A | CTRL+SHIFT+8 |
| **g. Bulleted List** | N/A | CTRL+SHIFT+7 |
| **h. Text Alignment** | Align Left<br>Align Centre<br>Align Right<br>Justify Full<br>Outdent<br>Indent | CTRL+SHIFT+L<br>CTRL+SHIFT+E<br>CTRL+SHIFT+R<br>CTRL+SHIFT+J<br>CTRL+SHIFT+[<br>CTRL+SHIFT+] |
| **i. Insert Table** | N/A | N/A |
| **j. Hyperlink Text** | N/A | CTRL+K |
| **k. UBC Tag** | Student ID<br>Legal Last Name<br>Preferred First Name | N/A |
| **l. Remove Font Style** | N/A | CTRL+\ |

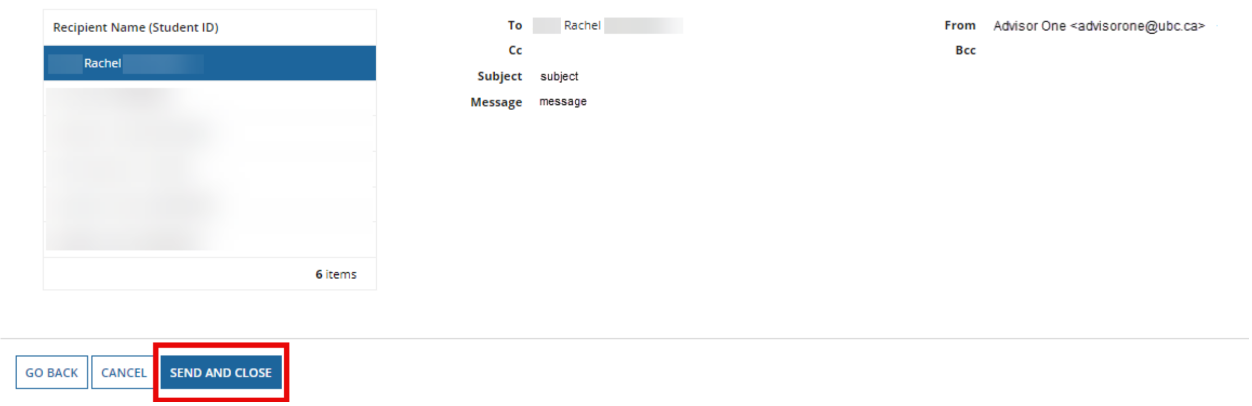
## Step 7: Review Recipient List and Email Contents

The left-hand side of the window will display the list of recipients.

The right-hand side of the window will display how the body of the email will appear to the individual recipients. By clicking a recipient on the left-hand side, the message will be updated to that individual.

## Step 8: Send Email

a. Click **SEND AND CLOSE** to distribute the email to the list of recipients.




## Step 9: Finishing Up

After sending the email, it is recommended to:

a. **View the status of the message in the "Sent Communications" tab.**
Refer to the training module of [“How to Review Sent Communication”] to ensure the emails have been received.

b. **Delete the local copy of the spreadsheet**
To ensure that student information is protected and used appropriately, after the communication has sent, users should delete the spreadsheet from their local drive.

c. **Check your email inbox**
The sender will receive one copy of the email to their mailbox automatically as a confirmation.

## Tips

- When the person is a worker and a student, the email address used will be the Worker email
- This tool does not replace OAMS or Canvas for communication and logging communication with students.
- Student email addresses cannot be exported out of Workday or the Student Communication Tool. Access to emails in a report requires an approved Data Access Request.

## Best Practices

1. **Use Student Communications Tool for Specific UBC Business Only**
   The Student Communications Tool is to be used only for the purpose of communicating targeted messages related to specific UBC business, including academics and emergency or safety notifications.
   a. A targeted message is one that contains information that will be seen as relevant by every recipient – use specific Workday reports that ensure the audience is appropriate
   b. A Student's Workday email address should not be used for general advertising, or event promotion (even internal events)
2. **Use the Find Students to Email report**
3. **Use UBC Tags to Personalize the Message**
   Personalize the message to the student by addressing them using their preferred name.
4. **Be Strategic in your Communication with Students**
   Instead of sending 3 emails with program information, create a strategic, targeted email containing a list of events and opportunities coming up in the next weeks/months. Sending multiple communication per week will likely result in a student tuning our all emails from UBC.
5. **Create an opt-in list serve for non-UBC business**
   For non-UBC business, units should find other methods of communicating to students such as social media or a unit list serve that students can opt into.
   a. If using a unit list serve, units are not to pull emails from Workday Student – students must opt into the list serve.
6. **Delete the excel file after every sent communication**
   While local excel files are required to send communications using the Student Communications Tool, the files should be deleted after the message has been sent by the user and received by the students.

## Additional Resources

- UBC Privacy Training
- UBC Protection of Privacy Resources
- UBC Privacy of Email Systems
- Canada's Anti-Spam Legislation