Administration Guide

Targeted Announcements Management

Updated 6/2011

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1 Introduction

The Targeted Announcement module allows administrators to send announcements to specific groups of users within the system. These announcements can be displayed in the users' announcements channel on their homepages, or sent via e-mail, or both. Groups can be set up based on a wide variety of criteria, including by location or according to the demographic information from individual account profiles. Administrators with different levels of responsibility can create and manage groups for the level(s) at which they have rights. By sending custom content announcements, administrators can also attach different resources, such as files and web links.

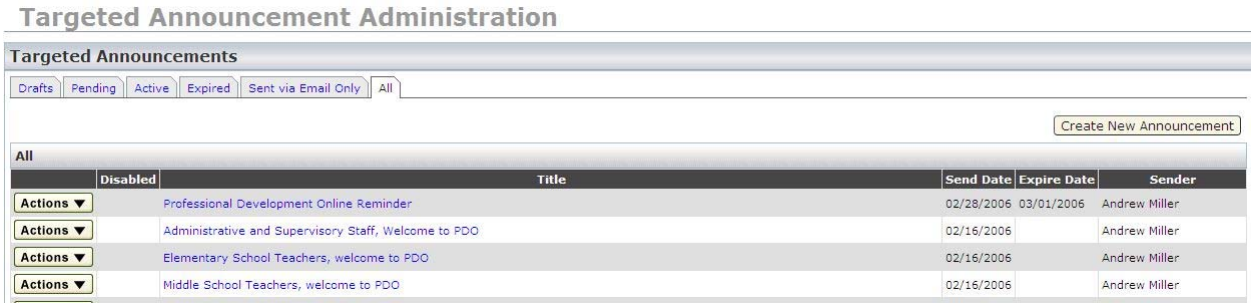
This tutorial covers the administrative functionality associated with the Targeted Announcements module, including creating and managing announcements, and concludes with the user functionality associated with this module.

Because your portal offers great flexibility in terms of customization and modification, the location and appearance of some functions may be slightly different in this tutorial. Differences in portal setup, such as the names of different administration levels, may also affect the look of different options on your portal, but the basic functionality will be the same.

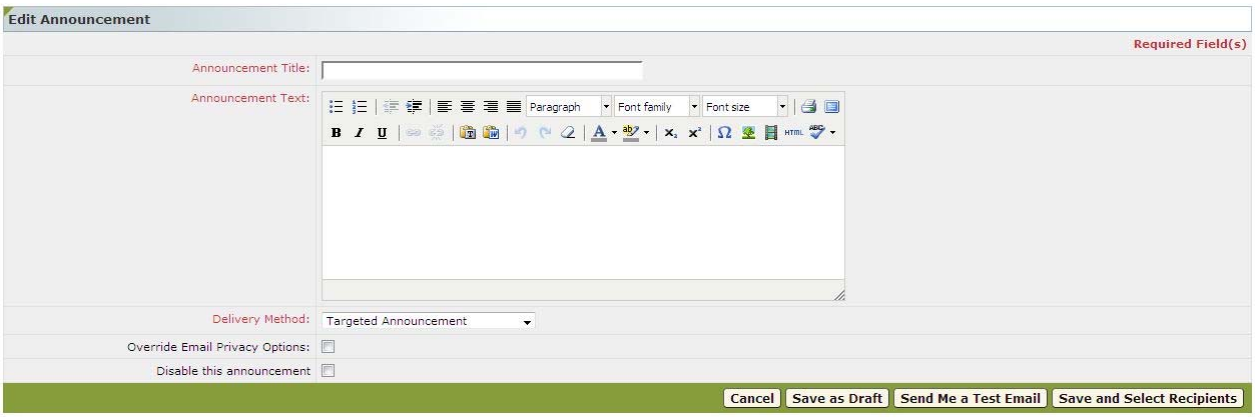
2 Creating a Targeted Announcement

Administrative rights for creating and managing targeted announcements can be assigned at multiple levels through system configuration. District system administrators can be given rights, for example, to send announcements only to users within their district, while school-level system administrators may have access to the targeted announcement functionality only for a single school. If administrative access is available, the module is accessible through the **Administration** tab.

1. On the **Administration** tab, click **Targeted Announcements** in the **Applications** channel.



2. Click **Create New Announcement** in the top right corner.



3. Enter an **Announcement Title**. This is the text that will be displayed as the announcement link in the user's My Announcements channel, and/or as the subject of the email that is sent.

4. Enter **Announcement Text**. This is the body of the email and/or the body of the announcement. Using the text editor, you can also add formatting, images and other media, and URL links.

5. Select the **Delivery Method** using the drop-down list. Options include posting the announcement on the My Announcements channel, emailing the announcement to specified users, or both.

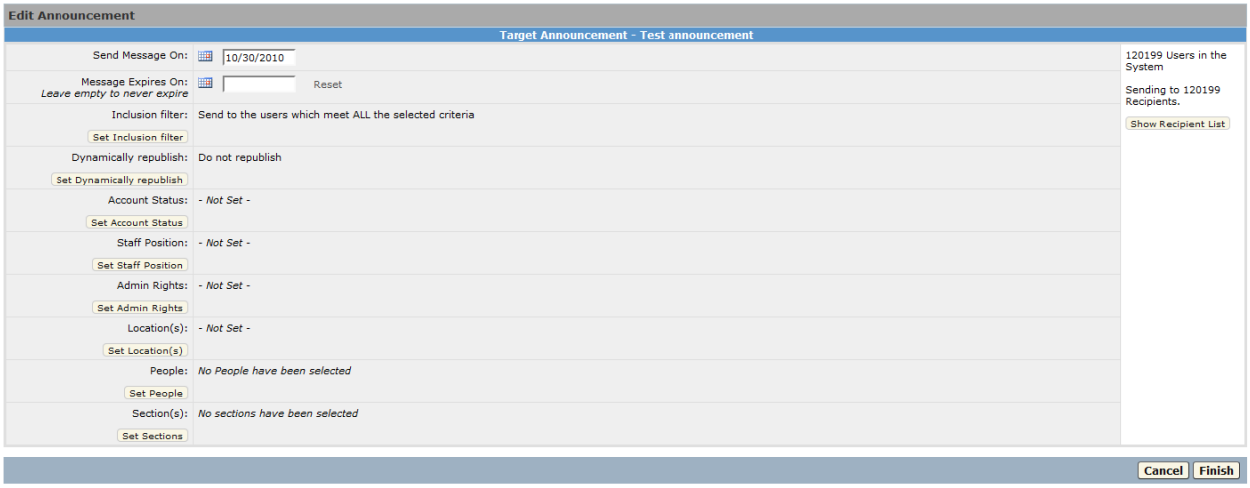
6. Select the checkbox if you want to override the users' email subscription block that is set up in the user profile for most clients. (Some clients disable this option so that users cannot opt out of portal emails. If this checkbox is not selected, users who have requested to not receive portal communications will not receive this announcement via email, even if they are included as a recipient.

7. Select the **Disable this Announcement** checkbox if you want to keep this announcement available without delivering it at this time. This feature is used more for editing existing announcements than it is for newly created announcements.

8. Click **Save as Draft** to put this announcement in the Drafts folder to be edited and sent at a later date.

9. Click **Send Me a Test Email** to have a copy of the announcement delivered to yourself so that you can see how it will look when the intended users access it via email.

10. Click **Save and Select Recipients** to save the current announcement and specify to whom the announcement will be delivered.



11. Indicate when the announcement will be sent. If no date is defined, the announcement will be sent as soon as it is completed and saved. Messages that are set to be delivered on a future date will be delivered on that date.

12. Use the calendar to specify an **Expiration Date** for the announcement. This is not needed for emailed announcements, but removes the announcement from the My Announcements channel on the specified date.

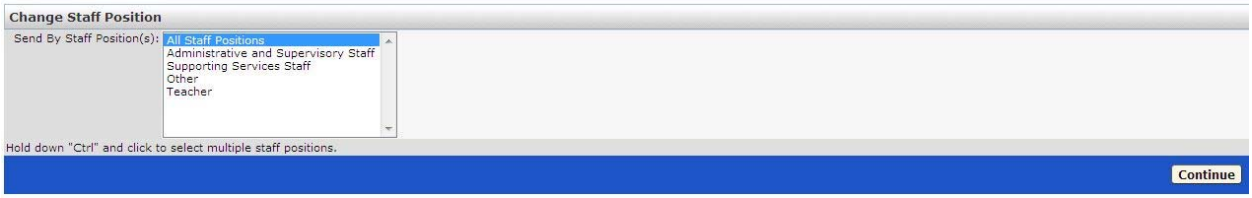
13. Click **Set Inclusion Filter** and use the radio button to specify how the search criteria will be applied to the list of potential users in determining who will receive the targeted announcement:

- Those who meet **all** of the specified criteria,
- Those who **do not meet all** of the selected criteria, or
- Those who meet **any** of the desired criteria.

14. Click **Dynamically Republish** and use the radio button to specify whether or not this announcement will be auto-published to anyone who meets the targeting criteria at a later date while the announcement is still published. If the re-publish option is selected, the system will re-evaluate the list of potential recipients each night and see if there are any individuals who meet the targeting criteria, but who did not receive the original announcement. This might occur, for example, if a teacher moves to a new school, or is assigned a new role.

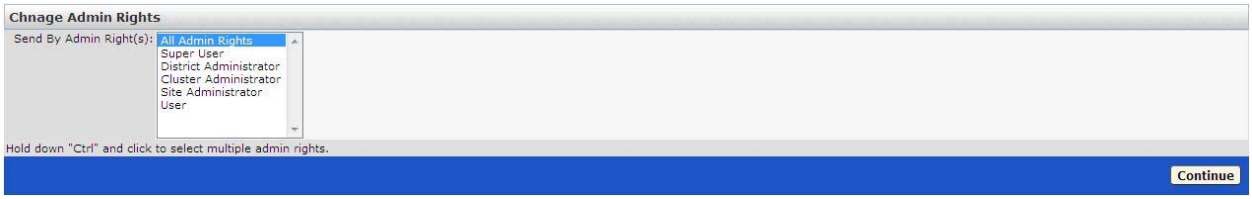
15. Click **Set Account Status** if you want to filter out those with active or inactive account statuses.

16. Click **Set Staff Position** if you want to specify users by position.



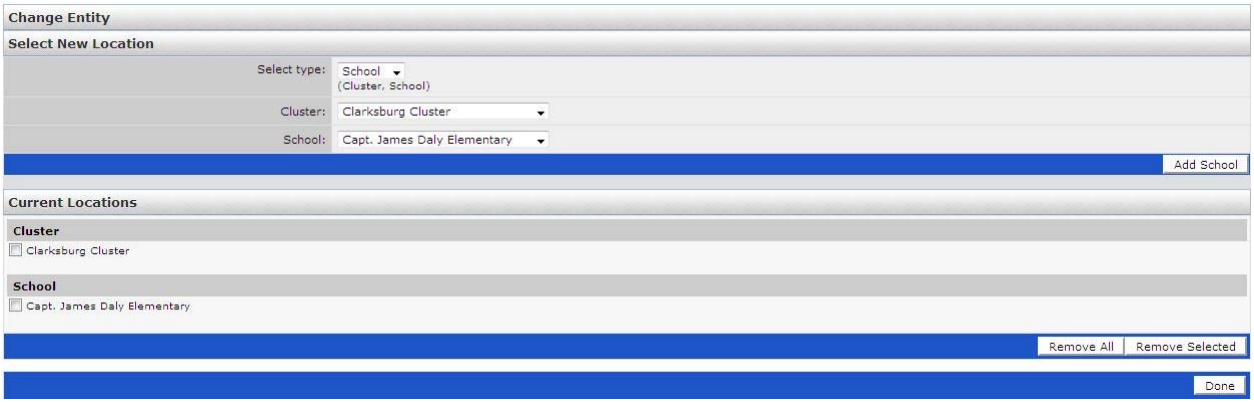
17. Select the desired staff position. Cntrl-click to select multiple positions. Then click **Continue**.

18. Click **Set Admin Rights** to define recipients based on system rights.



19. Select the level of administrative rights. Cntrl-click for multiple levels of rights. Then click **Continue**.

20. Click **Set Location(s)** to define recipients based on their location (school, district, etc.).



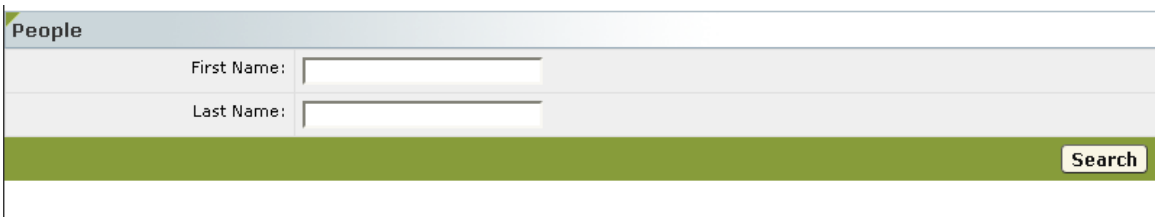
21. Select the location by locating the appropriate entity level, then selecting the desired location. Click the **Add** button to add the location to the list of current locations.

22. Repeat the process to add as many locations as desired. Locations do not have to be at the same level, meaning that you can target users at one district, as well as users at a couple of schools in a different district.

23. After selecting all desired locations, click **Done**.

24. Because users can be assigned to multiple locations, click the **Filter** button and use the radio buttons to indicate whether users targeted by location can be at *any* of the selected locations, or must be assigned to *all* selected locations.

25. Click **Set People** to search for individuals, by name, to receive this targeted announcement.

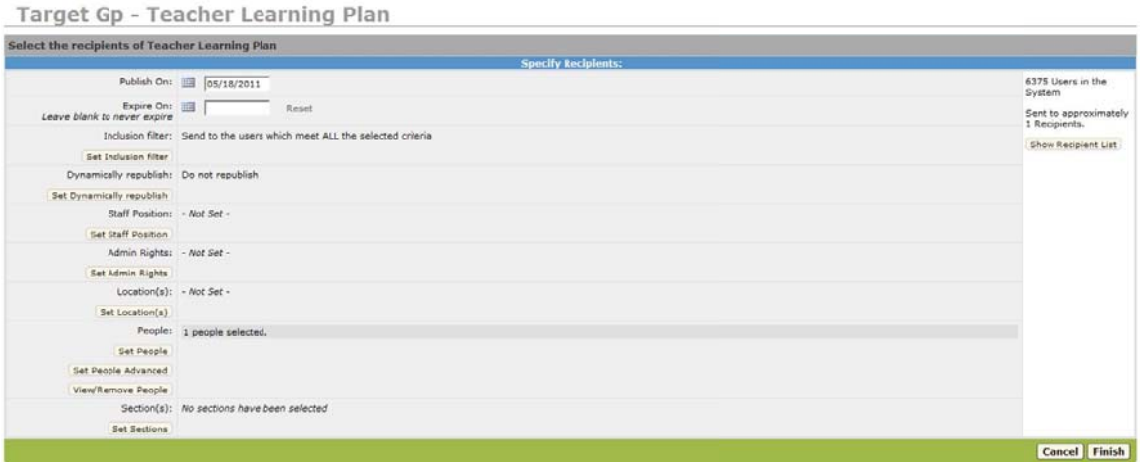


26. Enter the First and/or Last Name of the user to be targeted and click **Search**. Partial entry is also acceptable.

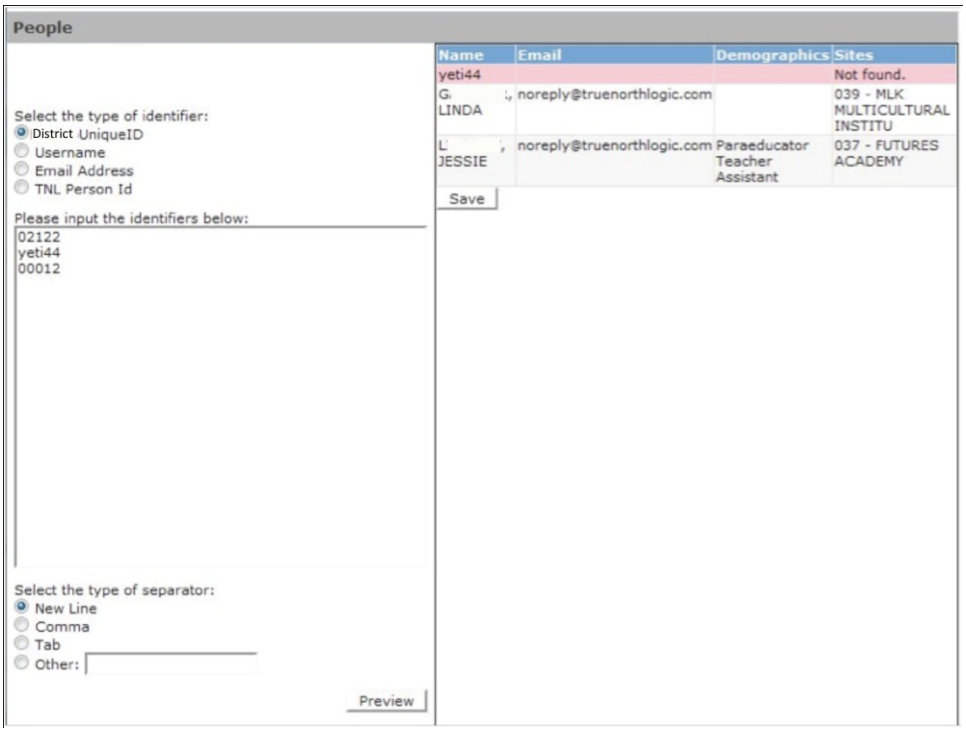
	Name	Email
☐	BOBBILYN	@truenorthlogic.com
☐	BOBBY	@truenorthlogic.com
☐	BOBBIE	@truenorthlogic.com
☐	BOBBI	@truenorthlogic.com

27. Select the checkbox(es) beside the desired user(s) and click **Done** at the end of the list.

28. Repeat the process until all desired individuals are added.



29. Click **Set People Advanced** to bulk target a list of people at the same time.



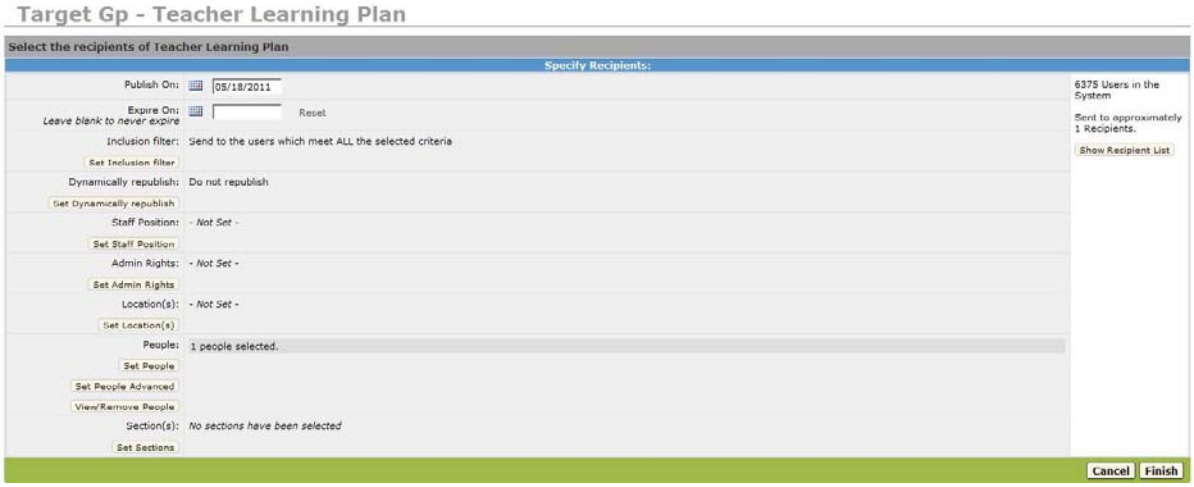
30. Use the radio button at the top of the form to indicate which identifier will be used to located individuals to be targeted.

31. Enter the list of identifiers, such as usernames or email addresses. These can be copied and pasted from other sources.

32. Use the radio button at the bottom of the column to indicate how the individual identifiers are separated. If you used something other than a return, tab, or comma to separate identifiers, select the **Other** button and enter the separating character in the textbox.

33. Click **Preview** to search for the identifiers. The results are shown on the right side of the screen. Individuals that were not found in the system will be highlighted in pink, and will be listed at the top of the results.

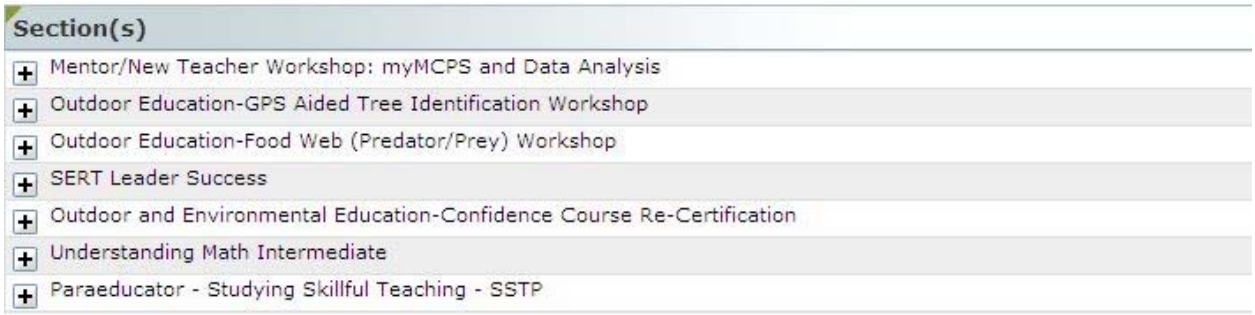
34. Click **Save** to target the selected individuals.



35. Click **View/Remove People** to review the list of people to whom the announcement is targeted and to remove one or more individuals.

36. Select the checkbox beside the name of an individual and click **Remove User(s)** to remove the targeting. You can also select the checkbox at the top of the page to remove targeting from all individuals.

37. Click **Set Sections** to target all registered participants of one or more course sections.



38. Click the plus sign beside a specific course to see a list of the sections for that course. Select the checkbox for any sections(s) that you want to target and click **Continue** at the bottom of the page.

39. Click **Show Recipient List** to see a list of all users which meet the targeting criteria. The number of users that are targeted to receive the announcement will be shown above this button, as well as the total number of users in the system.

Recipients

NOTE: The following list of recipients was generated right now based on the selection criteria in the announcement. However, the actual list of recipients may be or may have been different depending on the information in the system at the time of sending.

1 2 3 4 5 6 7 8 9 Next

	Last Name	First Name	Admin Rights	Staff Position	Sites	Demograpics
1.		Rose	User	Supporting Services Staff	Rocky Hill Middle School	Clerical/Executive Support
2.		Laurie	User	Teacher	Rocky Hill Middle School	Middle School Teacher
3.		Kathleen	User	Teacher	Clarksburg Elementary School	Counselor
4.		Sean	User	Teacher	Fox Chapel Elementary School Darnestown Elementary School Cedar Grove Elementary School	Physical Education
5.		Amanda	User	Supporting Services Staff	Clarksburg High School	Special Education Paraeducator
6.		Artemis	User	Teacher	Rocky Hill Middle School	Middle School Teacher

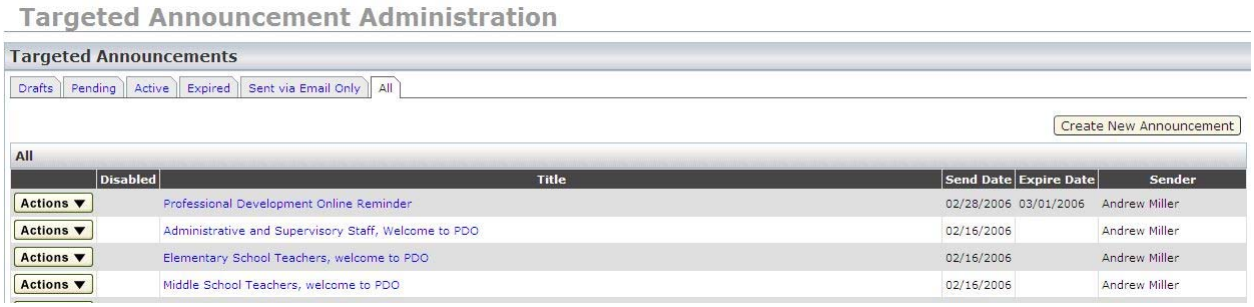
40. Click **Finish** to complete the process and schedule the announcement for delivery.

Important Note: When the announcement is targeted to a specific group of users according to demographics, such as location or teaching subject, it is possible that some users will miss the announcement because they join the targeted group later. At the individual announcement level, the system can be set to reevaluate the targeted group according to a set schedule (nightly by default) and will republish the announcement to any user who fits the targeting criteria but that did not receive the original announcement. The reevaluation schedule can be adjusted as needed.

3 Managing Targeted Announcements

Targeted announcements administrators can access all targeted announcements in the system, whether or not they personally created or sent them.

1. On the **Administration** tab, click **Targeted Announcements** in the **Applications** channel.



2. Click on the desired tab to sort announcements according to their current state:

   Drafts – Announcements that have been created, though they might not yet be finished, that are not active. They may have been scheduled for delivery or not, but were marked as drafts rather than sent.

   Pending – Announcements that have been created and scheduled for delivery, but that have not yet been delivered.

   Active – Announcements that have been delivered, but which have not yet expired, meaning they are still accessible through the My Announcements channel.

   Expired – Announcements which were delivered to the My Announcements channel, but which have expired and are no longer accessible there.

   Sent via Email Only – A list of announcements that were only sent via email.

   All – All announcements from all status categories.

Each of the existing announcements that meet the status criteria for the selected tab will be listed, with the title of the announcement, the send date, the expire date, and the creator. The title links to the announcement and opens it for editing if the announcement can be edited. If not, it will open in a read-only window.

The actions that are available for each announcement depend on the state of the announcement:

<u>View</u> – This option is available for announcements that were sent only via email. These announcements can be viewed, but not edited.

<u>Edit</u> – Open the announcement for editing. Announcements that are delivered to the My Announcements channel can be edited and will be changed when the user refreshes their browser. Announcements that were delivered by email will not be changed.

Expire Now – This is used to removed an active announcement from the My Announcements channel, even if the scheduled expiration date is in the future, or was never set.

Disable – This makes the announcement undeliverable, removing it from the My Announcements channel if it was there, or preventing it from being delivered it was scheduled for delivery in the future.

Delete – This permanently removes the announcement from the system. It is used to clean up the system, but should not be used if a communication record is needed.

View Recipients – Generate a list of those who were targeted to receive the selected announcements. The list also includes a status icon to indicate if the announcement has been accessed yet (green), not yet accessed (orange), or deleted without opening (red).

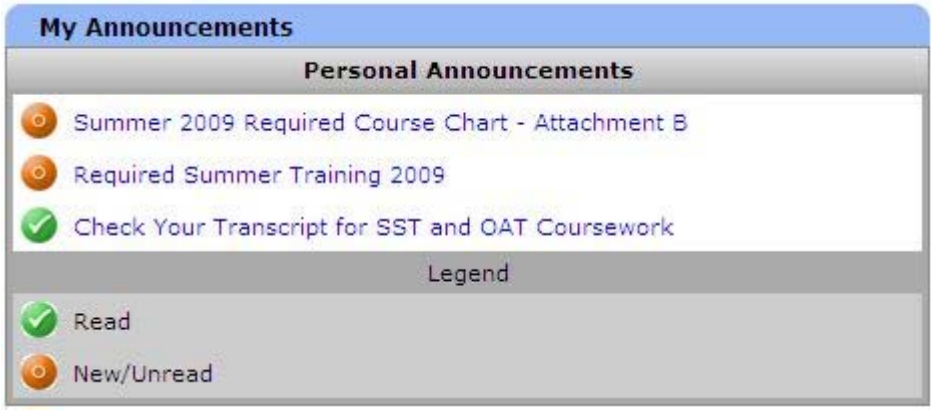
Recipients

Prev 1 2 3 4 5 6 7 8 9 10 11... Next

	Last Name	First Name	Admin Rights	Staff Position	Sites	Demograpics	Status
201.		Katherine	User	Teacher	John T. Baker Middle School	Special Education	
202.		Joanne	User	Teacher	Roberto Clemente Middle School	Central Services Specialist ESOL Resource Teacher	
203.		Donna	User	Teacher	Takoma Park Middle School	Middle School Teacher	
204.		Sandra	User	Teacher	Jones Lane Elementary School	Special Education	
205.		Cynthia	User	Teacher	A. Mario Loiederman Middle Sch	English Interdisciplinary Resource Teacher	

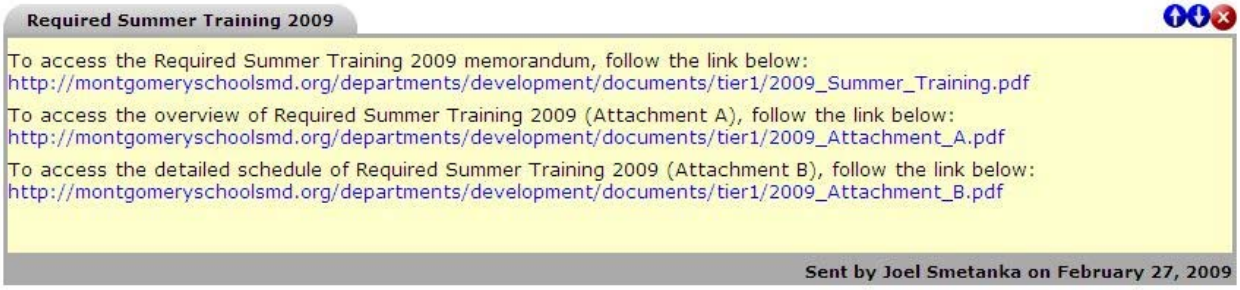
4 Viewing Targeted Announcements (User Functionality)

The portal users usually view targeted announcements through a channel on the homepage.



The announcements which were sent to the user will be listed in the order they were sent, with the most recent announcement on the top of the list. A status icon will also indicate whether individual announcements have been viewed or not.

1 Click the announcement title to view the announcement.



The announcement will be displayed, as well as the name of the person who sent the message and the date it was delivered.

2 Use the blue arrows at the top of the page to scroll to the next, or previous announcement in the list.

3 Use the red **X** at the top of the page to delete this announcement from the My Announcements list.