Messages and Emails

The Communication screen allows users to compose messages and post announcements for select profile users. Emails and Files can be attached to messages and announcements, as needed. Messages can also be scheduled to be sent at a later date or saved as a draft; all incoming and outgoing messages are also housed here to review and send/view replies. Note: With the Call Out System enabled, district users also have the option to attach SMS and Phone Calls to message and announcements.

Communication

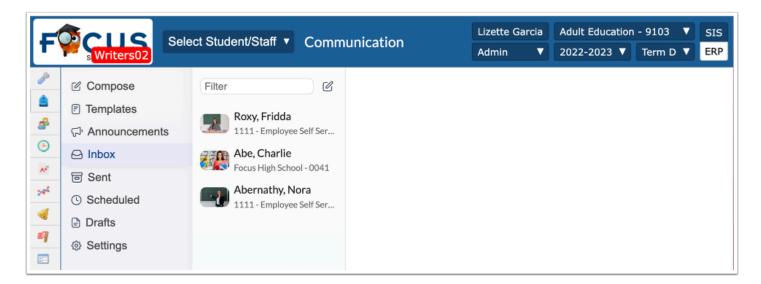
Announcements

The Announcements feature is used to create and publish messages on the Portal page viewable by all schools (district-level admin only), selected schools, an individual school, staff, parents, and/or students.

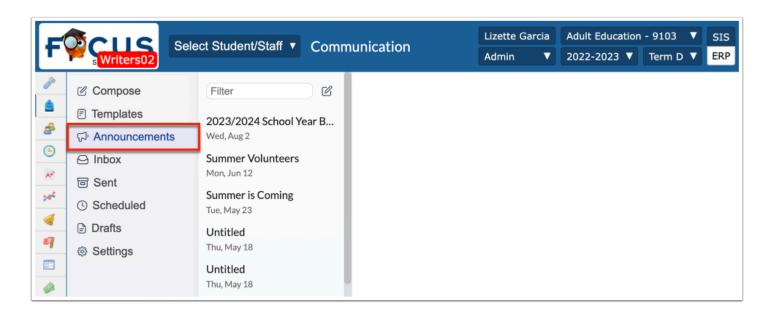
Viewing Existing Announcements

1. From the **Students** menu, select **Communication**.

Your **Inbox** loads by default.

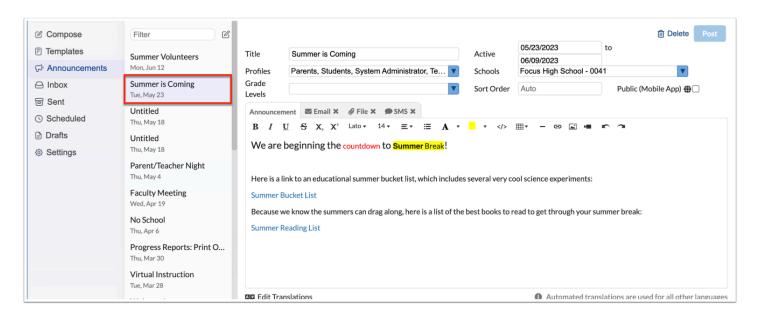


2. Click the Announcements tab.



Existing Announcements are displayed in order of the most recent published Active date. Only users with Edit permission will see the pencil icon on the right.

3. Select the applicable announcement from the list.



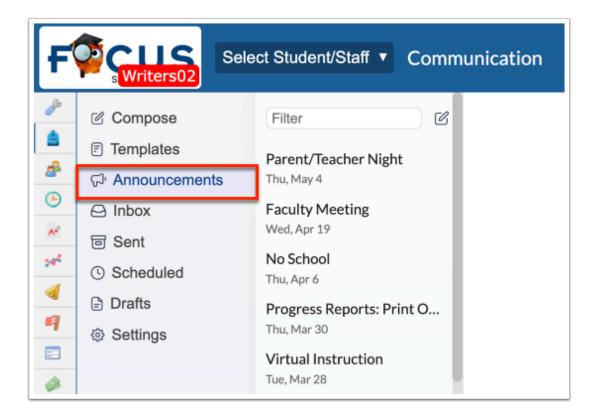
Shown below is an example of what the screen looks like without the Call Out System. Notice the SMS and Call tab no longer display.



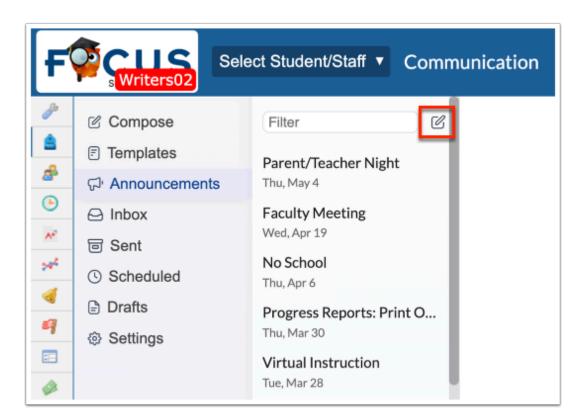
The Call and SMS icons only display if the district is using the Call Out System AND you have the appropriate profile permissions. The edit icon to the right of the Filter field displays if you have edit permission to Announcements. If you do NOT have edit permission to Announcements, all fields are locked and display as inactive fields.

Creating Announcements

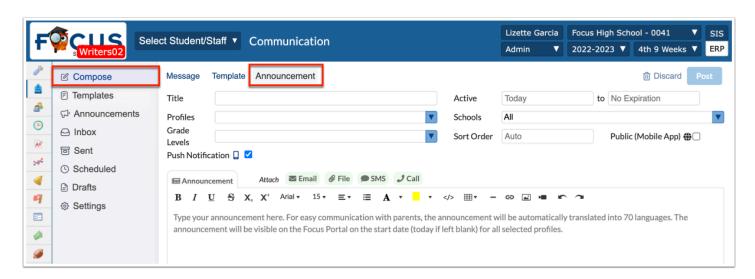
1. Click the **Announcements** tab.



2. Click the **pencil** icon to create a new announcement.



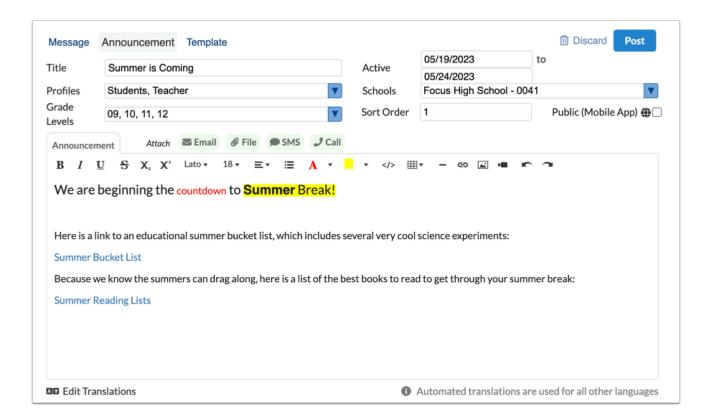
Alternatively, from the **Compose** tab, click **Announcement**.



Shown below is an example of what the screen looks like without the Call Out System. Notice the SMS and Call tab no longer display.



- **3.** Enter the **Title** for the announcement in the provided text box.
 - The **Title** is required to post an announcement.



4. Enter the **Active** start date and end date in the text boxes provided. Enter the start date to determine the date in which the announcement should be posted to the Portal and the end date to determine when it should be removed.

The Active start date defaults to Today while the end date defaults to No Expiration. If an end date isn't specified, the announcements displays on the Portal until deleted or end dated.

5. Select the **Profiles** who can view this announcement from the corresponding pull-down.



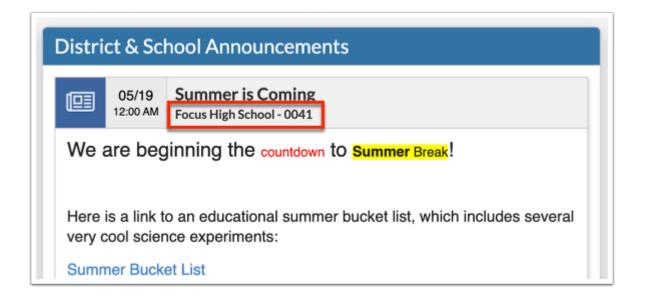
At least one profile must be selected in order to post the announcement, unless the announcement is posted as Public (Mobile App).

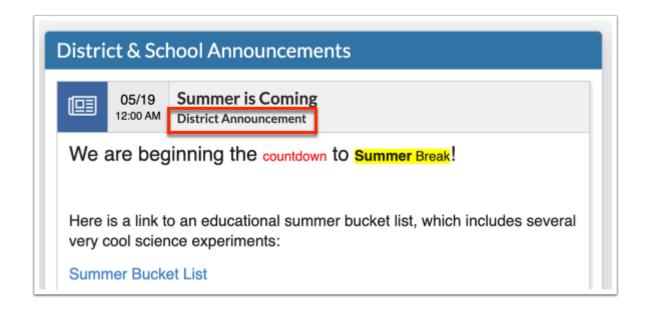
- **6.** Select the **Schools** for which the announcement should display from the corresponding pulldown
 - The schools displayed in the pull-down depend on the schools to which you have permission/access.
- 7. Select the **Grade Levels** of students who should view the announcements on their portals from the corresponding pull-down. Note: If Grade Levels are selected, Students should also be selected from the Profiles pull-down.
- **8.** Enter a **Sort Order** in the provided text box to set a defined order in which announcements display. If no Sort Order is defined, by default they will appear by Active publish date. If some announcements have sort orders and other do not, the announcements with sort orders will take precedence over those without. If multiple announcements have the same Sort Oder, the secondary Active publish date will be applied in order to sort them.
 - Note: Entering a Sort Order is completely optional, since the announcements will sort naturally with the most newly available announcement at the top for all users, if it is not set.
- **9.** Select the **Public (Mobile App)** check box to make the announcement visible to users in the Mobile App who are not logged into Focus. Note: This is only applicable to customers utilizing the Community Mobile App.
- **10.** Select the **Push Notification** check box to send a push notification to mobile app users when the announcement is posted.
- **11.** Enter the **Announcement** in the provided text editor. There are a variety of tools available, including text formatting and the ability to add links and images.
- 12. Click the **Email** attachment tab to attach an email to the announcement. When the announcement becomes active, the email contents will be sent to the select profile users.
 - For Student Profiles, the email will be sent to the student's primary email address. For User Profiles, the emails will be sent to the users' email address.
- **13.** Click the **File** tab to scan or drag and drop files to be attached. Once attached, the File displays with the message for the user to download. If an email is also attached, the file will be sent as an attachment in the email as well.
- **14.** Click **SMS** to attach an SMS text to the Announcement. When the announcement becomes active, the SMS text is sent to the selected profile users. This option is only displayed for users with the SMS profile permission enabled.

- For Student Profiles, the SMS is sent to the student's primary phone number on their Address card where SMS enabled.
- For Parent Profiles, the SMS is sent to the custodial contact with the SMS flag.
- For User Profiles, the SMS is sent to the users' phone number.
- **15.** Click the **Call** tab to type a text-to-speech message or record a template call to be attached to the message.
 - The SMS and Call functionality require the purchase of the Call Out System. If this addon hasn't been purchased and enabled by your district, the SMS and Call option doesn't display. Contact your district's support representative to set up a demonstration.

16. Click Post.

Announcements that are set up without any schools selected will display with the subtitle District Announcement in the District & School Announcements Portal block. Announcements with a single school selected will display the school's name in the subtitle. Announcements with multiple schools selected will display without a subtitle.

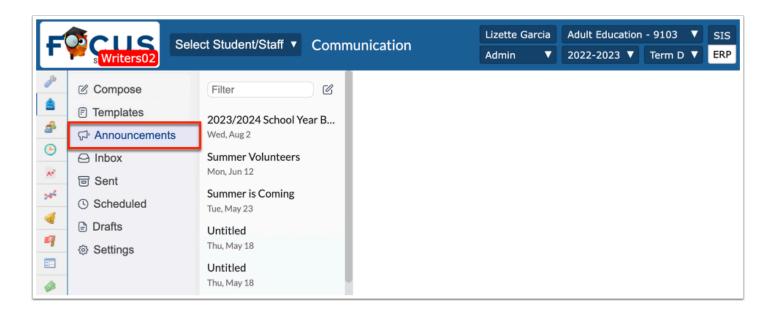




For administrators and teachers, only announcements and events for the school selected from the school pull-down located in the header displays. For parents, announcements and events across all schools for which students are enrolled displays.

Editing Announcements

- **1.** From the **Students** menu, select **Communication**.
- Click the Announcements tab.



3. Select the announcement that needs editing from the list.

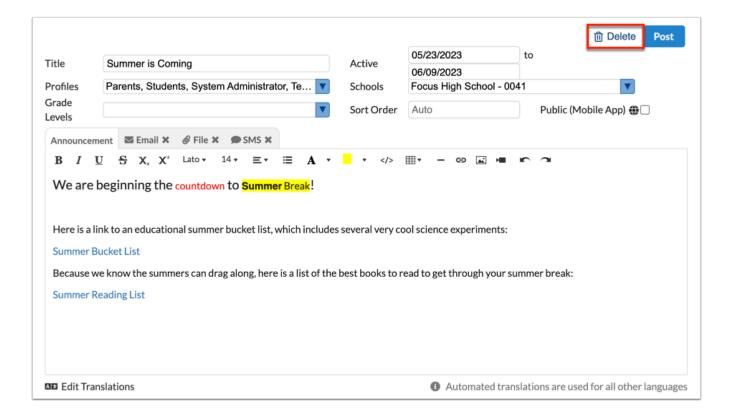
- 4. Edit the general fields, as needed, including the Title, Active date, Profiles, Schools, etc.
- 5. Click Post to apply changes.

Deleting Announcements

- **1.** From the **Students** menu, select **Communication**.
- 2. Click the Announcements tab.



- **3.** Select the announcement that needs to be deleted.
- 4. Click Delete.



5. Click **Delete** in the conformation pop-up window.

Templates

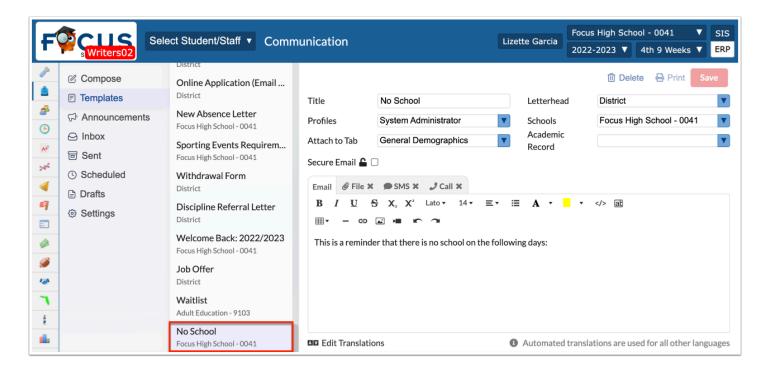
Templates allow users to create and save recurring letters and email messages to be sent out to students and users. Existing school and district letters can also be accessed from the Templates menu.

Viewing Existing Templates

- **1.** From the **Students** menu, select **Communication**.
- **2.** Click the **Templates** tab.

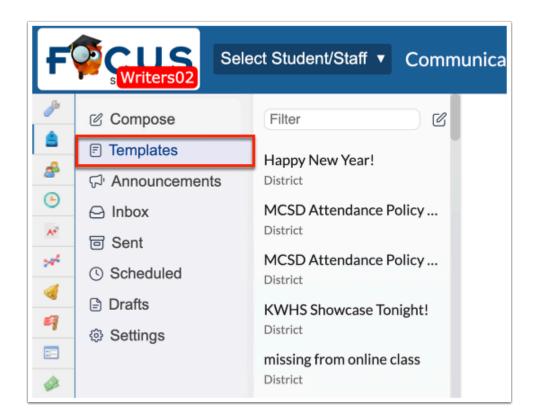


3. Select the applicable template from the list.

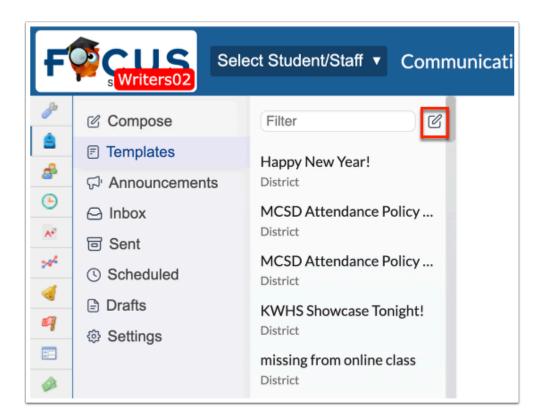


Creating Templates

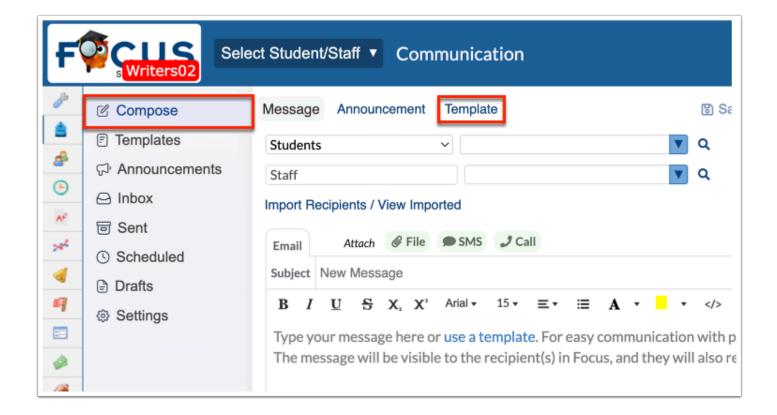
- **1.** From the **Students** menu, select **Communication**.
- **2.** Click the **Templates** tab.



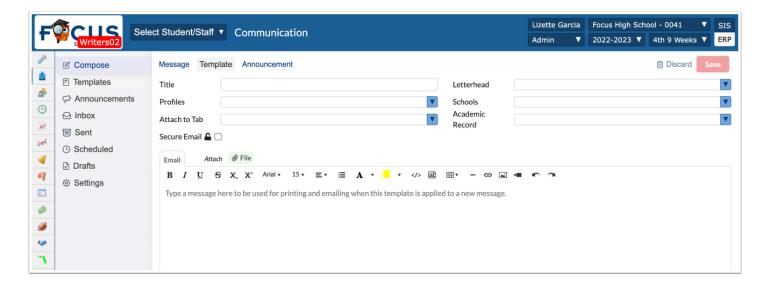
3. Click the **pencil** icon to create a new template.



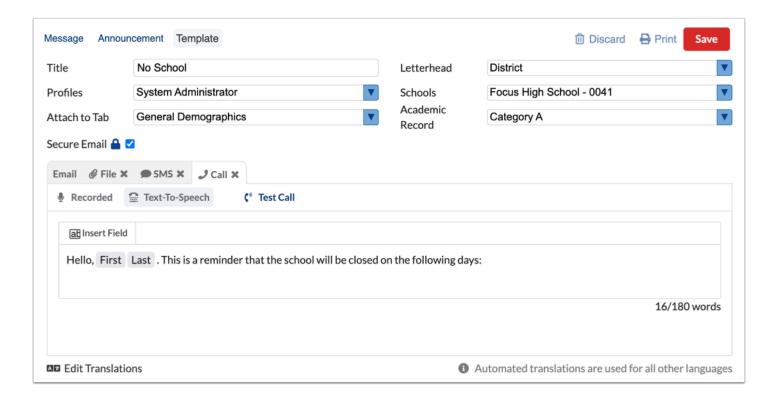
Alternatively, from the **Compose** tab, click **Template**.



Shown below is an example of what the screen looks like without the Call Out System. Notice the SMS and Call tab no longer display.

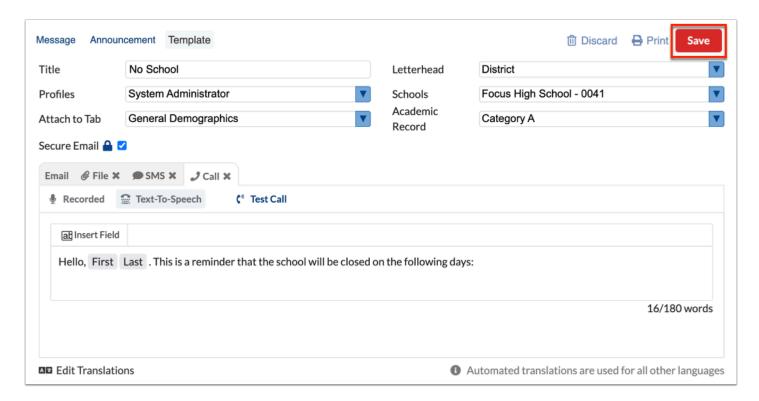


4. Enter the **Title** of the template in the provided text box.



- **5.** Select the **Letterhead** template from the pull-down that should be applied to the template.
- **6.** Select the **Profiles** who can view and use this template from the corresponding pull-down.
- **7.** Select the **Schools** that can access and use this template from the corresponding pull-down.
- **8.** To make the template available on a tab, such as the Demographic tab in Student Info, select the tab from the **Attach to Tab** pull-down.
- **9.** Select the applicable **Academic Record** category from the pull-down to determine how the template (when applied) is stored in the students' cumulative folder.
- **10.** Select the **Secure Email** check box to generate a secure message upon using the template to send a message. The Student/User will receive a notification to log into their portal account to view the secure message.
- **11.** Select the **Push Notification** check box to send a push notification to mobile app users when the template is used.
- **12.** From the **Email** tab, enter the contents of the email in the provided text editor. When the template is used, the email contents will be sent to the select profile users.
 - For Student Profiles, the email will be sent to the student's primary email address. For User Profiles, the emails will be sent to the users' email address.
- **13.** Click the **File** tab to scan or drag and drop files to be attached. Once attached, the File displays with the message for the user to download. If an email is also attached, the file will be sent as an attachment in the email as well.

- **14.** Click **SMS** to attach an SMS text to the Announcement. When the announcement becomes active, the SMS text is sent to the selected profile users. This option is only displayed for users with the SMS profile permission enabled.
- For Student Profiles, the SMS is sent to the student's primary phone number on their Address card where SMS enabled.
- For Parent Profiles, the SMS is sent to the custodial contact with the SMS flag.
- For User Profiles, the SMS is sent to the users' phone number.
- **15.** Click the **Call** tab to type a text-to-speech message or record a template call to be attached to the message.
 - The SMS and Call functionality require the purchase of the Call Out System. If this addon hasn't been purchased and enabled by your district, the SMS and Call option doesn't display. Contact your district's support representative to set up a demonstration.
- **16.** Click **Save** to save the template.



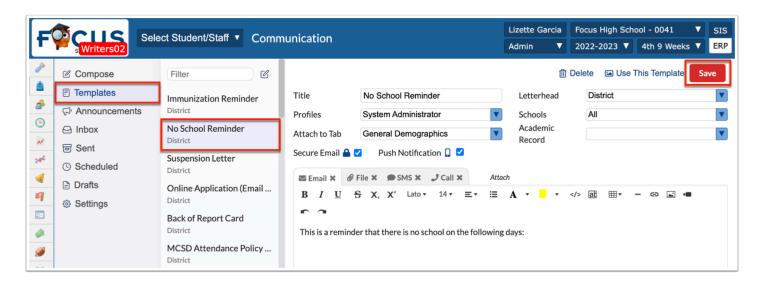
Click **Discard** to to discard the template if you do not wish to save it.

Click **Print** to print the template.

Editing Templates

1. From the **Students** menu, select **Communication**.

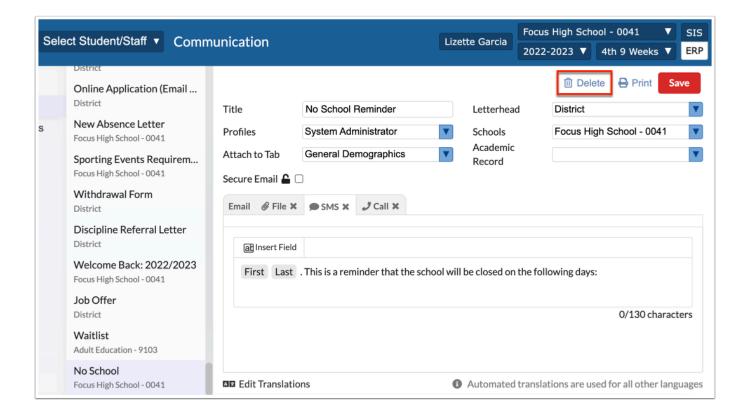
- 2. Click the **Templates** tab.
- **3.** Select the template that needs editing from the list.



- **4.** Edit the general fields, as needed, including the Title, Letterhead, Profiles, Schools, etc. and the contents of the Email.
- 5. Click Save to apply changes.

Deleting Templates

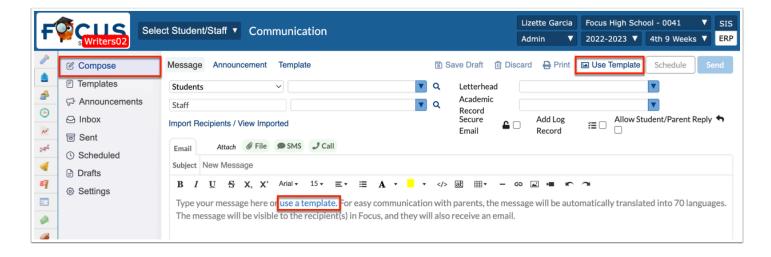
- 1. From the **Students** menu, select **Communication**.
- 2. Click the Templates tab.
- 3. Select the template that needs to be deleted from the list.
- 4. Click Delete.



5. Click **Delete** in the conformation pop-up window.

Using Templates

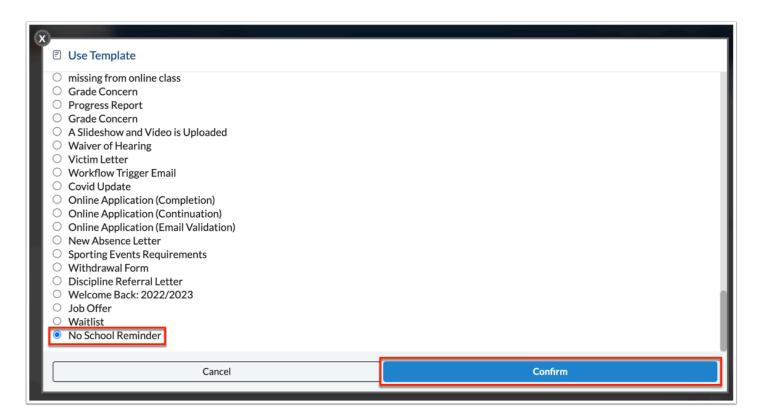
- **1.** From the **Students** menu, select **Communication**.
- 2. Click the **Compose** tab to create a new message.
 - **a.** Click **Use Template** at the top or click **use a template** in the body of the message.



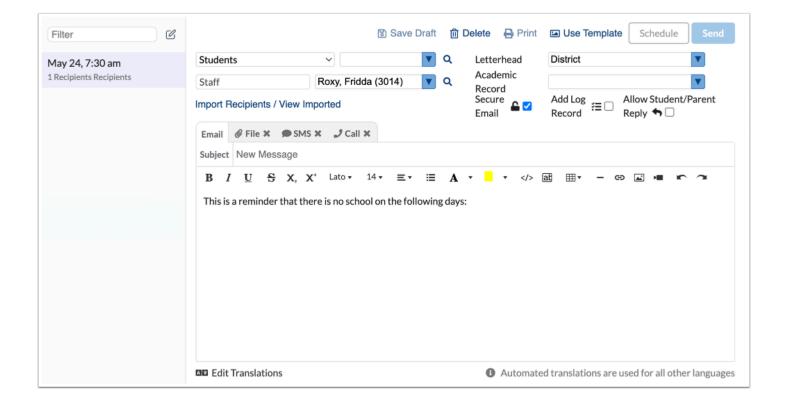


You can also select **use a template** from the **Scheduled** and **Drafts** tabs.

3. In the Use Template pop-up window, select the correct template to apply to your message, and click **Confirm**.



The data from the template loads and populates your message.



Compose

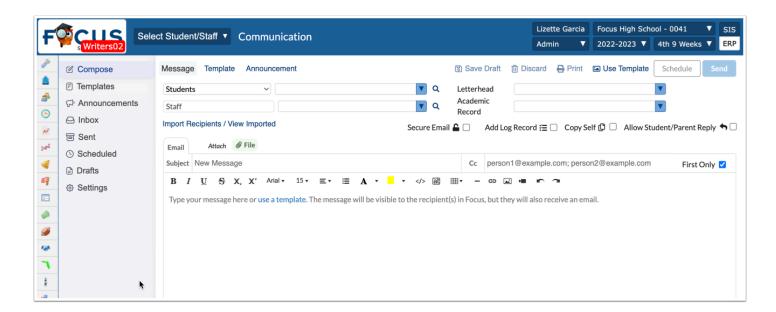
Compose allows for new messages to be created and sent to the desired students, parents, and/or users through Focus. Depending on the users' permissions, messages can be sent through the Communication module, by email, text, or phone call.

Composing New Messages

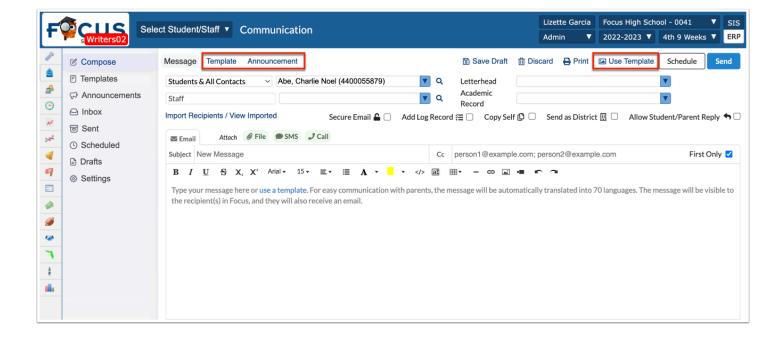
The Compose tab allows users to create new messages (previously Messenger) to selected students and/or staff, use a template, create a new portal announcement (previously Portal Messages), and/or create a new template.

The SMS and Call functionality require the purchase of the Call Out System. If this addon hasn't been purchased and enabled by your district, the SMS and Call option doesn't display. Contact your district's support representative to set up a demonstration.

- 1. In the **Students** menu, click **Communication**.
- **2.** Click the **Compose** tab.
 - 3 Shown below is an example of what the screen looks like without the Call Out System. Notice the SMS and Call tab no longer display.



In addition to composing a message, there are various other options available from this screen. To create an **Announcement**, create a **Template**, or **Use Template**, click the corresponding buttons.

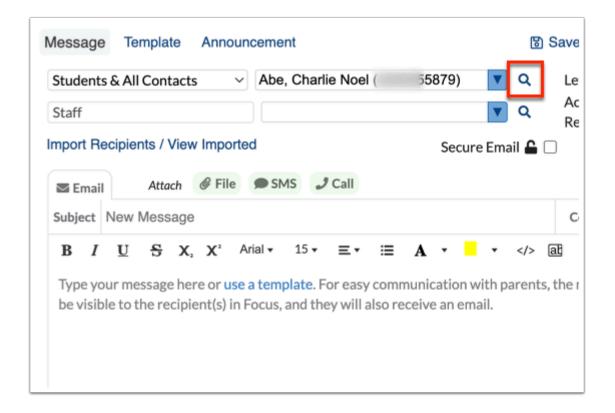


3. Select the student recipient type from the provided pull-down. This option allows you to choose how the Student and/or Family will be receiving the message. Options include:

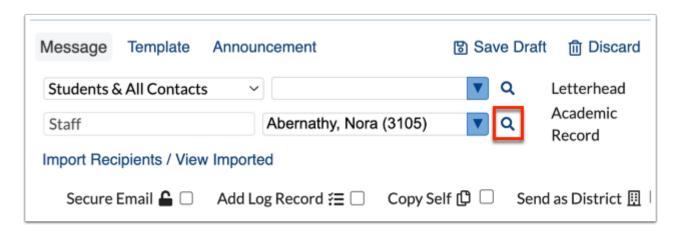
- **Students** sends the message to the student's primary email address and/or phone number as identified in the address block of Address & Contacts via Student Info.
- **Student Personal** sends the message to the student's Personal Email address as identified in Student Info.
- **Primary Contacts** limits to the contacts marked as custody.
- All Contacts includes all users and/or persons in a student's addresses and contacts.
- Once Per Family sends the message to the student's custodial contacts and/or contact with
 a Sort Order priority of 1. The Linked Students section in Student Info > Addresses &
 Contacts is also used to determine which students are in the same family. Within a sibling
 group, one student within the group who has at least one contact is selected randomly and
 all of their custodial contacts are messaged. If that student has two contacts with the same
 linked user, those two contacts are deduped into one, and the user can see the message
 when logging in, or through any attached notifications.
- **Teacher Of** sends the message to all the students' current teachers.
- **Students & All Contacts** sends the message to the student's primary email address and/or phone number as identified in the address block of Address & Contacts via Student Info, and all users and/or persons in a student's addresses and contacts.
- **Students & Primary Contacts** sends the message to the student's primary email address recorded in Student Info, as well as all logged custodial contacts for the selected student. If the student's custodial contacts reside at different addresses or have different recorded email addresses, the message will be sent to all addresses.



- **4.** Select the Student Recipients from the provided pull-down. Select which Students should receive the message.
 - a. Click the magnifying glass to conduct a student search and utilize More Search Options.



- **b.** Perform a student search.
- **c.** Using the check boxes displayed next to the students, select the students to whom you'd like to send the message. The selections here populate the original student pull-down. Select the check box in the header to select all displayed students at once.
- d. Click Done.
- **5.** Select the **Letterhead** template that you'd like applied to your message from the pull-down, if applicable.
- **6.** Select the Staff Recipients from the provided pull-down. Select which users should receive the message.
 - **a.** Click the magnifying glass to conduct a user search and utilize More Search Options.



b. Perform a user search.

- **c.** Using the check boxes displayed next to the users, select the users to whom you'd like to send the message. The selections here populate the original staff pull-down. Select the check box in the header to select all displayed users at once.
- d. Click Done.
- **7.** Select the applicable **Academic Record** category from the pull-down to determine how the message is stored in the students' cumulative folder.
- **8.** Select the **Secure Email** check box to flag the messages as secure and require users to log into Focus in order to view the message.
- **9.** Select the **Push Notification** check box to send a push notification to mobile app users when the message is sent.
- **10.** Select the **Add Log Record** check box to log the message in the students' and/or users' Letter Log record in Student Info and/or User Info. The message will be logged when the message is sent. Messages are also logged for students when the message is printed.
- **11.** Select the **Copy Self** check box to copy yourself on the email so a copy of the email is sent to you as well as the selected recipients.
- **12.** Select the **Send as District** check box to send messages (and attachments) to recipients from the "district;" the message displays as if sent by the district and doesn't include your name or information. Once sent, you will receive a confirmation that the message was sent, but the message will not display in your Sent folder.
- **13.** Select the **Allow Student/Parent Reply** to allow student and parent recipients to reply to your message. If this check box is left cleared (disabled), students and parents will not be able to reply to this message.
- **14.** Enter the **Subject** of the message in the provided text box. If a subject is not entered, the subject defaults to New Message.
- **15.** To copy other users on the message/email, enter the emails addresses separated by semicolons in the **Cc** text box. For example, lizette@focus.org; robinjacobs@gmail.com
- **16.** Select the **First Only** check box to copy the entered email addresses in the Cc text box on one email only. When the check box is cleared, the email addresses entered in the Cc text box display on all emails sent.
- **17.** Enter the **Email** (message) in the provided text editor. There are a variety of tools available, including text formatting and the ability to add links and images.
- **18.** Click the **File** tab to scan or drag and drop files to be attached. Once attached, the File displays with the message for the user to download. If an email is also attached, the file will be sent as an attachment in the email as well.
- **19.** Click **SMS** to attach an SMS text to the Announcement. When the announcement becomes active, the SMS text is sent to the selected profile users. This option is only displayed for users with the SMS profile permission enabled.

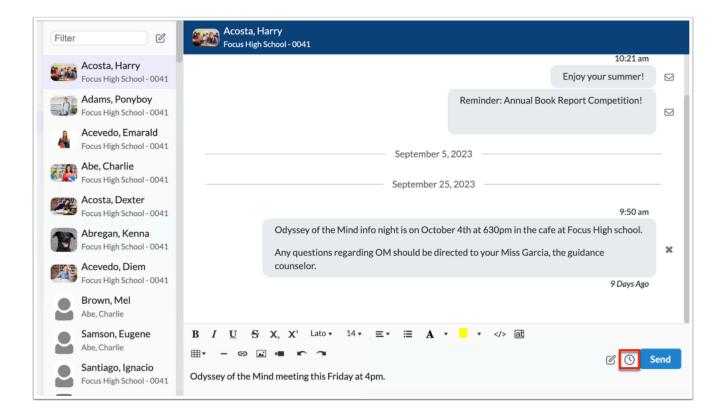
- For Student Profiles, the SMS is sent to the student's primary phone number on their Address card where SMS enabled.
- For Parent Profiles, the SMS is sent to the custodial contact with the SMS flag.
- For User Profiles, the SMS is sent to the users' phone number.
- **20.** Click the **Call** tab to type a text-to-speech message or record a template call to be attached to the message.
 - The SMS and Call functionality require the purchase of the Call Out System. If this addon hasn't been purchased and enabled by your district, the SMS and Call option doesn't display. Contact your district's support representative to set up a demonstration.
- **21a.** Click **Send** to send the message right away. Once sent, the message displays in the Sent tab.
- **21b.** Click **Schedule** to schedule when the message should be sent.
- **21c.** Click **Save Draft** to save the message as a draft. If saved as a draft, the message will be saved with all attached data in the Drafts tab.
- **21d.** Click **Discard** to to discard the message if you do not wish to save it or send it.
- Click **Print** to print the message.

Scheduling Messages

Messages can be scheduled to be sent out at a later date and time, as well as be scheduled to be recurring.

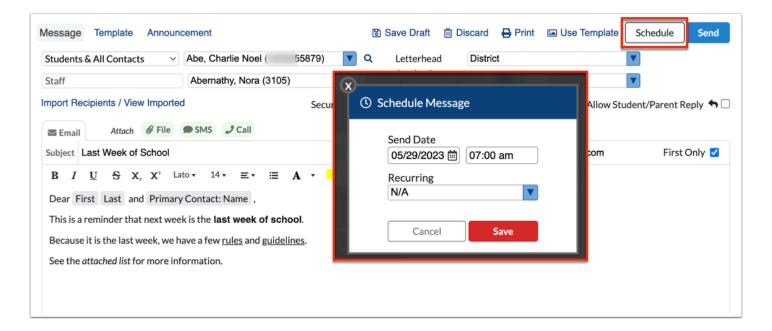
1. While composing a message, click **Schedule** to schedule when the message should be sent.

You can als schedule messages from the **Inbox** and **Sent** tabs by clicking the **clock** icon.



- **2.** Select the Send Date using the calendar pop-up and enter the send time in the provided text box.
- **3.** If the message is **Recurring**, select the recurring method from the pull-down, such as Daily, Weekly, Monthly, or Annually.
- 4. Click Save.

Once scheduled, you can view the message in the Scheduled tab.



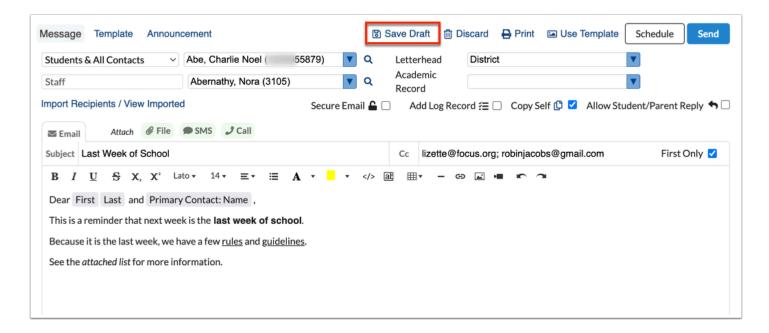
Drafts

When composing messages, you have the ability to save your message as a draft to be completed or sent at a later time.

Saving Messages as Drafts

While creating a message, you can click Save Draft to save your progress at any point. At least one recipient must be selected from the list in order to save the draft. Once a draft is saved, the Drafts tab will load with the draft open. You can navigate away and return to the Drafts tab at any point to complete and send or discard the draft.

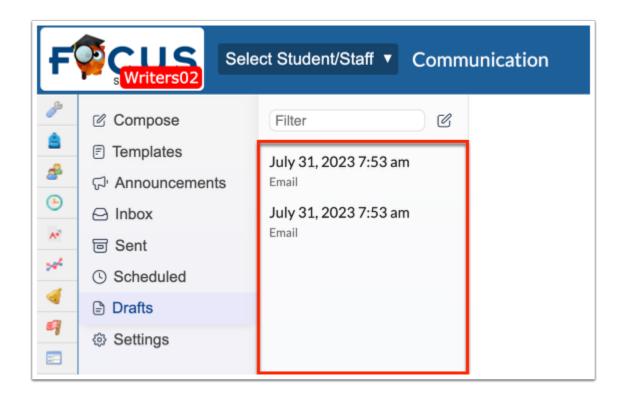
While composing a message, click **Save Draft** to save the message as a draft. If saved as a draft, the message will be saved with all attached data in the Drafts tab.



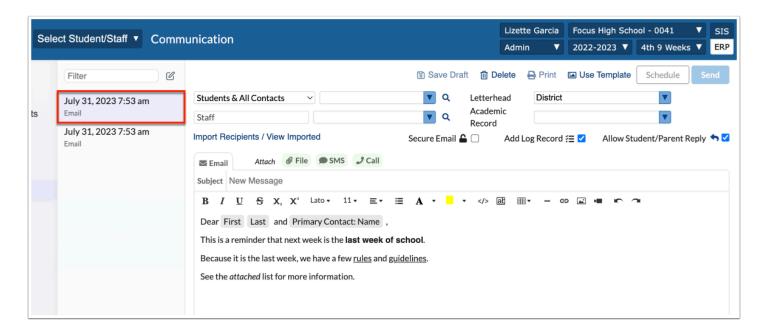
Viewing Drafts

- 1. In the **Students** menu, click **Communication**.
- 2. Click the **Drafts** tab.

Drafted messages are displayed with the date saved and the type of message, such as Email.



3. Click the drafted message to view details.

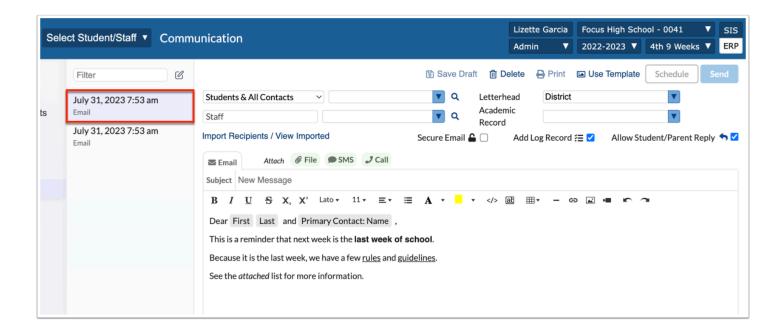


Editing Drafts

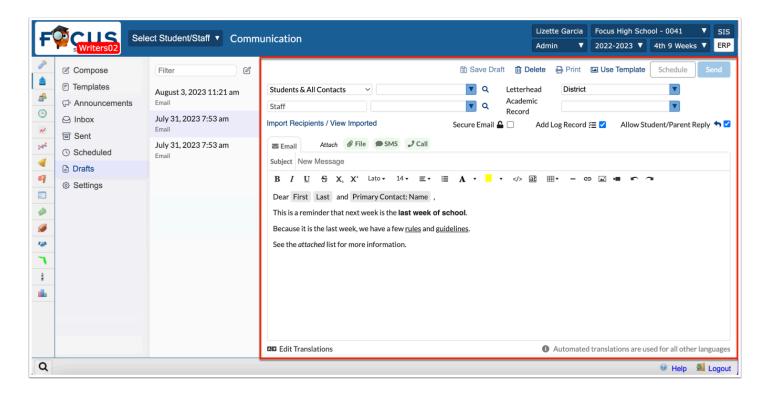
- 1. In the Students menu, click Communication.
- 2. Click the **Drafts** tab.

Drafted messages are displayed with the date saved and the type of message, such as Email.

3. Click the drafted message to view details.



Once selected, the drafted message displays. Complete composing your message and prepare to send the message or save it as draft again.



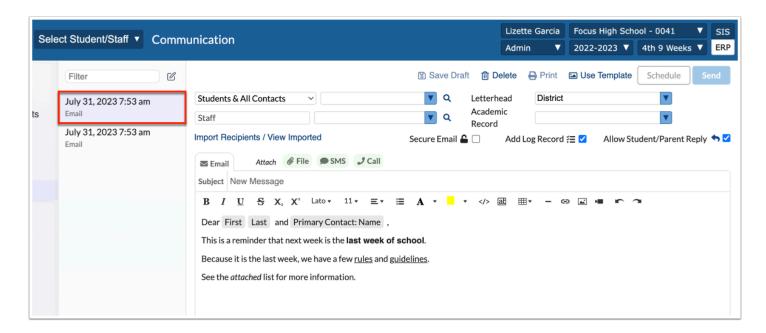
4. Click **Save Draft**, **Send**, **Schedule**, or the applicable button.

Deleting Drafts

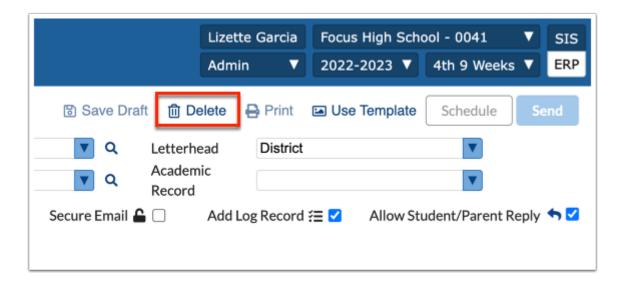
- 1. In the Students menu, click Communication.
- 2. Click the **Drafts** tab.

Drafted messages are displayed with the date saved and the type of message, such as Email.

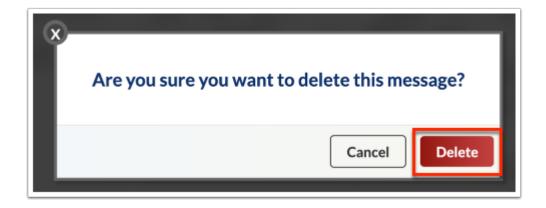
3. Click the drafted message to view details.



4. Click Delete.



5. In the confirmation pop-up window, click **Delete**.

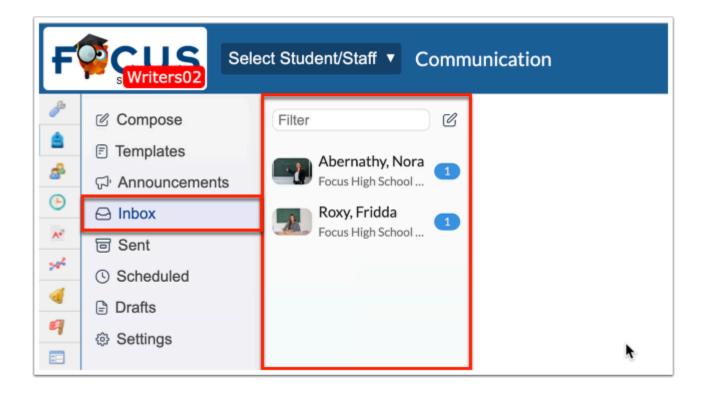


Inbox

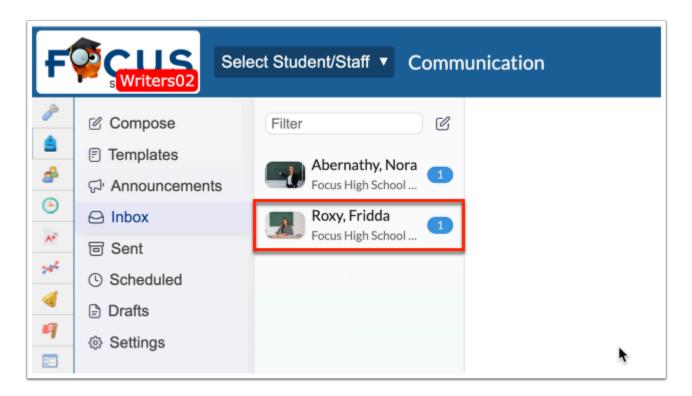
The Inbo tab displays all incoming messages sent from students, parents, teachers, and other users. The Inbox tab loads by default when accessing Communications. Message threads are in order of most recently received and display the sender's name and the number of unread messages (if any).

- 1. In the **Students** menu, click **Communication**.
- **2.** Click the **Inbox** tab.

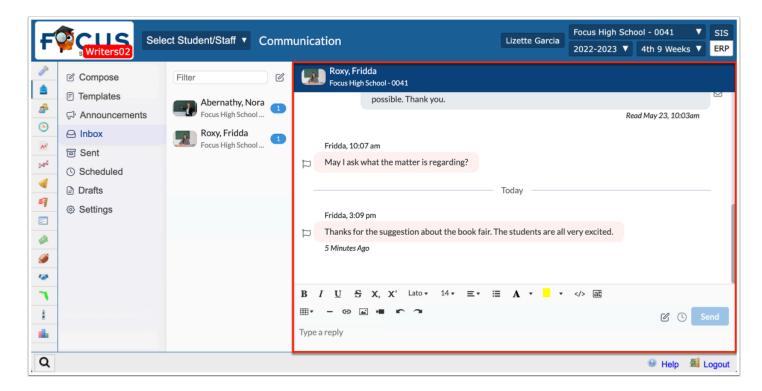
All incoming messages are displayed along with the sender's name and their associated school. The number of unread messages displays next to the sender's name.



3. Click the sender's name to open the messages.



Once selected, all incoming and outgoing messages between you and the selected user displays. The date and time is displayed along with all messages.



The icons next to the messages determined the message status and allow various tasks.

The **clock** icon indicates that the message is processing.

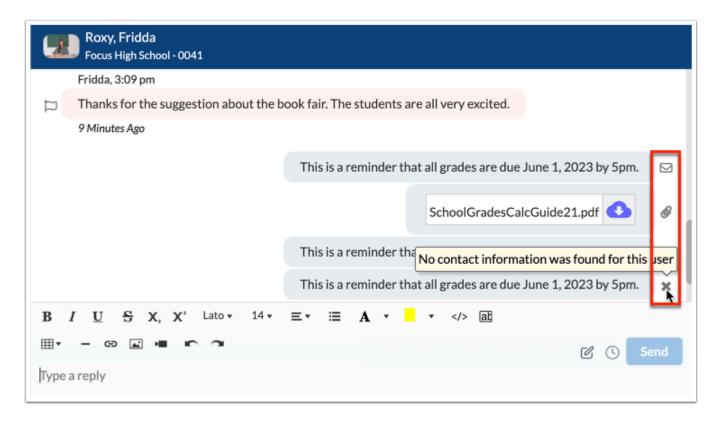
The **envelope** icon determines the email was sent.

The **paperclip** displays for attachments. These files can be clicked and downloaded/viewed.

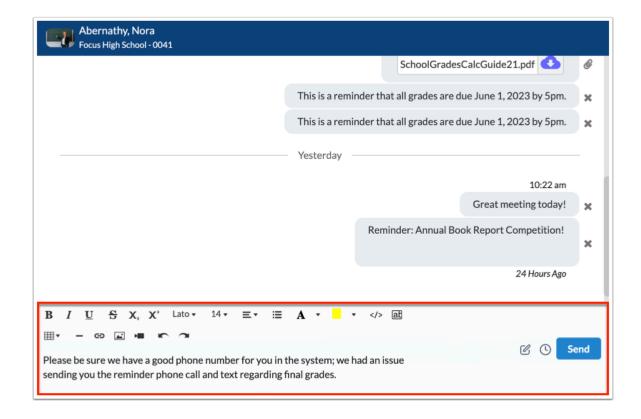
The \mathbf{x} icon displays when a message couldn't be sent; the reason the message wasn't sent displays when you hover over the x icon normally because No Contact Information was found. This means the message was delivered to the recipient's Focus Inbox but the recipient was not notified otherwise due to invalid contact data.

The **phone** icon displays when the phone call was sent.

The **message** bubble icon displays when a SMS was sent.



4. To respond to incoming messages, type your message in the provided text area. There are a variety of tools available, including text formatting and the ability to add links and images.



- **5a.** Click **Send** to send the message right away.
- **5b.** Click the **clock** icon to schedule the message to be sent at a later date and time.

Sent

The Sent tab displays all outgoing messages sent from you to students, parents, teachers, and other users. Message threads are in order of most recently sent at the top of the list and display the recipient's name.

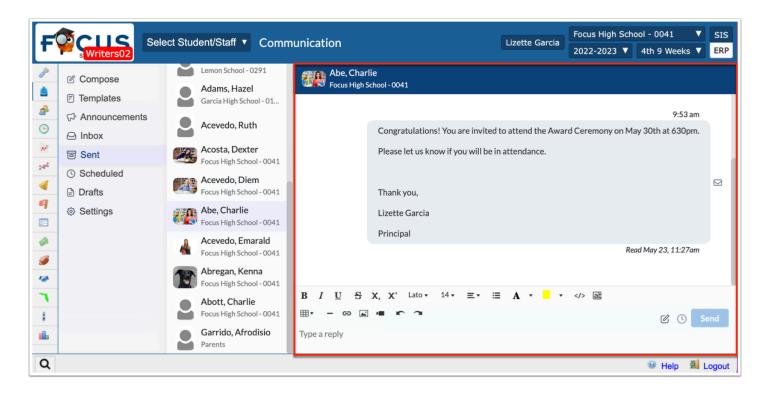
- 1. In the Students menu, click Communication.
- 2. Click the Sent tab.

All outgoing messages are displayed along with the recipient's name and associated school.



3. Click the recipient's name to open the messages.

Once selected, all outgoing and incoming messages between you and the selected user displays. The date and time is displayed along with all messages.



The icons next to the messages determined the message status and allow various tasks.

The **clock** icon indicates that the message is processing.

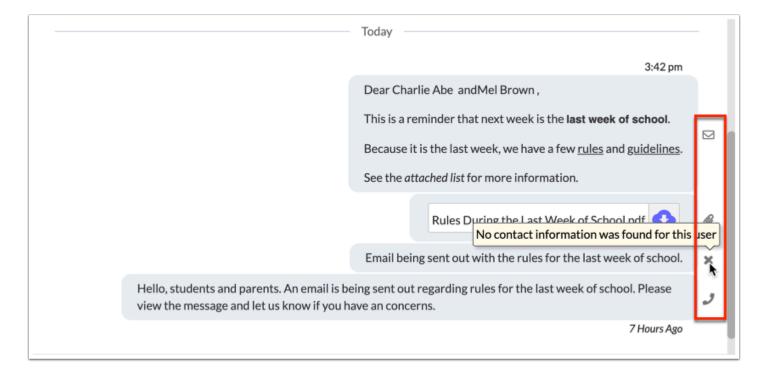
The **envelope** icon determines the email was sent.

The **paperclip** displays for attachments. These files can be clicked and downloaded/viewed.

The \mathbf{x} icon displays when a message couldn't be sent; the reason the message wasn't sent displays when you hover over the x icon normally because No Contact Information was found. This means the message was delivered to the recipient's Focus Inbox but the recipient was not notified otherwise due to invalid contact data.

The **phone** icon displays when the phone call was sent.

The **message** bubble icon displays when a SMS was sent.



- **4.** To send additional messages, type your message in the provided text area. There are a variety of tools available, including text formatting and the ability to add links and images.
- **5a.** Click **Send** to send the message right away.
- **5b.** Click the **clock** icon to schedule the message to be sent at a later date and time.