My Messages
Portal Messaging Training for Campus Solutions 9.0

6/5/2017
Version 3
<table>
<thead>
<tr>
<th>Module 1: Overview</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Training Instructions</td>
<td>3</td>
</tr>
<tr>
<td>Portal Messaging at a Glance</td>
<td>3</td>
</tr>
<tr>
<td>Prerequisites</td>
<td>2</td>
</tr>
<tr>
<td>Course Objectives</td>
<td>2</td>
</tr>
<tr>
<td>Module 2: Portal Messaging Policy</td>
<td>3</td>
</tr>
<tr>
<td>Module 3: Navigating to UCSC Messaging</td>
<td>4</td>
</tr>
<tr>
<td>Module 4: Posting Messages</td>
<td>5</td>
</tr>
<tr>
<td>Lesson 5: Retracting Messages</td>
<td>8</td>
</tr>
<tr>
<td>Lesson 6: Viewing Message Recipients</td>
<td>10</td>
</tr>
<tr>
<td>Training Complete!</td>
<td>12</td>
</tr>
</tbody>
</table>
Module 1: Overview

Online Training Instructions

To complete the My Messages online training, please review the information in this training guide. Once you have familiarized yourself with the policies and procedures, you will take the My Messages quiz online.

Please note that you will not be able to complete the training exercises in this guide until you have received My Messages access. However, once you have completed the My Messages quiz and received notification that your My Messages access has been established, please revisit this guide to try out some of the exercises.

If you have questions about obtaining access to My Messages, open an IT Request ticket by logging in to itrequest.ucsc.edu or emailing help@ucsc.edu.

Portal Messaging at a Glance

Portal Messaging allows staff and faculty users to post targeted, one-way official communications to a users’ MyUCSC portal. Faculty can post messages to students in a specific class or to all of the students in all of their current classes. Staff can reach any users based on specific needs (for example all students receiving financial aid). The messages are text only and include two URL fields for hyperlinks.

Clicking View Messages takes the user to this screen:
Prerequisites

This guide is based on the following assumptions:

- User has solid understanding of computers
- User is familiar with the internet
- User has staff access to AIS Campus Solutions 9.0 (find out how to request access)
- User is using a web browser that is supported for use with AIS/MyUCSC (please review the list of supported browsers).

Course Objectives

- Logging In/Navigation
- Reviewing Policy
- Posting List Messages
- Posting Messages Using Uploaded UCSC IDs
- Posting to Class Rosters
- Posting by Instructor
- Retracting Messages
- Viewing Message Recipients
Module 2: UCSC Messaging Usage Policy

UCSC Messaging may be used by academic departments, faculty and transactional office staff to communicate messages to students, faculty or staff.

- Messages must be one-way communications (recipients cannot respond to My Messages).
- Messages must convey information related to the business of UC Santa Cruz (not for personal use).
- Messages must be targeted to a relevant population.
- Messages must not contain content that is antithetical to UC Santa Cruz’s Principles of Community.
- Messages must have an expiration date.

Advertising a new course or campus event to all students, or all MyUCSC users, is not an appropriate use of this tool.

In an effort to ensure that My Messages are viewed as reputable and important by recipients, this tool should be used for messages that are timely and relevant to the user. For example, when advertising a campus event, the message should be sent only to users who have an expressed interest in the topic. This can be gauged by participation in similar events, enrollment in a related course, employment in a particular department, unit or division, enrollment in a particular major or minor program of study, etc.
Module 3: Navigating to UCSC Messaging

2. Using the Navigator in the NavBar (compass icon), go to Campus Community > UCSC Messaging > Post/Retract Messages.

Users may also have access to this page via the UCSC Messaging tile on their Adviser, Faculty or Staff homepage.
Module 4: Posting Messages

1. Notice the **Date/Time**.
   Date/Time displays the date and time the message will be marked as sent.

2. Set the **From** value. (required)
   This will be displayed to the message recipient.

3. Select your **Type**. (required)
   There are four methods by which users can select message recipients:
   - by uploading a list of users,
   - by selecting a class roster,
   - by selecting an instructor, and
   - by entering a list of users.

   Not all users have the ability to post messages using all four methods. In addition to the guide below, on-screen instructions will display based on the Type you select.

**Upload UCSC IDs**

Create a text file (.txt) with Student IDs. (e.g. 1234567, 0246933) InfoView is helpful for generating a list of IDs. Your file can be saved from Excel or Word as a .txt file and should have each ID on a new line.

**Mac Users:** When saving an Excel file as .txt, be sure it is saved as Text (Windows). When saving a Word doc as .txt, save as Text Only (MS-Dos).

**PC Users:** When saving an Excel file as .txt, be sure it is saved as Text (MS_DOS). When saving a
Word document as text, save it as Plain Text.

Click the Upload button. Browse for the file.

Class Roster

Enter the Term and Class Number. Use the lookups for each field (magnifying glass icon) if you need assistance locating the correct codes. Click the Populate button. Select the Post To checkbox to select specific recipients or use the Select All button. Note: Faculty using the Class Roster message type will only be able to select rosters for classes they teach.

By Instructor

Enter an Instructor's AIS ID. Select the Term and click the Populate button. Use the term lookup (magnifying glass icon) if you need assistance locating the correct term code. Use View All, to see all message recipients. Note: Instructors will only be allowed to enter their own IDs.

List

Enter a list of AIS IDs separated by commas in the To field. Lists cannot be longer than 100 characters, including commas. The maximum number of IDs this field can hold is 12. Do not put a space between IDs. Do not place a W before the IDs.

4. Enter a Subject line. This can be up to 30 characters long. (required)
5. Enter the Message Text. (required)
6. Enter a URL in one or two of the URL fields if you want the message to contain a clickable hyperlink. (optional)
7. Select an Expiration Date for the message. Expired messages will not display on the recipient’s portal. (required)
8. Click Post.

The message is immediately available to the recipients’ MyUCSC portal. The Send Confirmation page displays, with a link to Return to UCSC Messaging.
Lesson 5: Retracting Messages

After posting a message to students’ portal, it can be retracted. If you have just clicked Send, click Return to UCSC Messaging and click Retract. Messages can also be retracted at a later date, however, they cannot be retracted from students who have already read the message.

1. Navigate to Send and Retract Messages.
2. Click Update/Display in the bottom right corner.
3. Enter specific search criteria, or just click Search to display all the messages you have sent.

The Search Results display at the bottom of the page.

4. Select the message to be retracted and click Retract.
Note: If a student has already read a message, it cannot be retracted for that recipient.

The Retract button will be replaced with a confirmation message indicating that the message was unsent.
Lesson 6: Viewing Message Recipients

In addition to seeing who a message was sent to, you can also view the status of their message (read vs unread) as well as the date it was read by the recipient.

1. Using the Navigator in the NavBar (compass icon), go to Campus Community > UCSC Messaging > Message Recipients.

2. Enter specific search criteria or click Search to view all messages sent.
   The Search Results display at the bottom of the page.

3. Select a message.
   The Message Recipients page opens, displaying all recipients and the date the message was read.
   You can filter the list by Read vs Unread status using the Recipient Status dropdown, and sort the grid columns by clicking on the column headers.
   You can export the list to Excel using the Download to Excel feature (grid icon).
   You can search for an individual in the recipient list using the Find link above the results grid.
**UCSC Messaging**

**Message Recipients**

**Datetime Created:** 11/08/2010 9:40:47.000000AM

**From User:** W1231955

**Subject:** Math 128A Cancelled Today

**Recipient Status:**

---

<table>
<thead>
<tr>
<th>User ID</th>
<th>UCSC ID</th>
<th>Name</th>
<th>Date Read</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 W</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 W</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 W</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 W</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 W</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 W</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Training Complete!

Now that you’ve reviewed the training guide, please take the My Messages training quiz.

Once you’ve completed the quiz, within three business days you should receive notification that your My Messages access has been established. When you have access to My Messages, please revisit this workbook to try out some of the exercises.

If you have questions about obtaining My Messages access or you need help, please open an IT Request ticket by logging in at itrequest.ucsc.edu or emailing help@ucsc.edu.