New Features Overview

For Administrators

Figure 1: Manage Workgroup Messaging Interface

Product News

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A new messaging function within the application enables you to alert your users to important information when they log into the system. This feature, designed to complement the existing Information Board and Event Tracker areas, is designed as a tool for alerting all users in a workgroup to time-sensitive information and action items.

Important! It is imperative that you click the **Update Message** button to save any changes or additions you have made to the message body before you Activate the message. If you do not update the message before activating, the additions and changes will be lost.

Workgroup Messaging

It is important to note that the Workgroup Messaging feature triggers a pop-up message upon log in for all users in the particular workgroup as well as a hyperlink to the message on each user's Home page. If you wish to tailor different messages to various sub-groups of users, use the Message Board and Event Tracker areas. In the case of the Workgroup Messaging function, the pop-up will appear for all users when they log into the system the first time after it is activated. The user then has a choice to click the "do not show this message" for the pop-up box, which will prevent the pop-up window from launching when they log in and will also remove the hyperlink to the message on the home page. When a message is updated, only those users with the message still turned on will see the updated message. However, if a new message is activated, all users will see the new message in the pop-up box when they log in.

__**Creating and Activating a New Workgroup Message**__

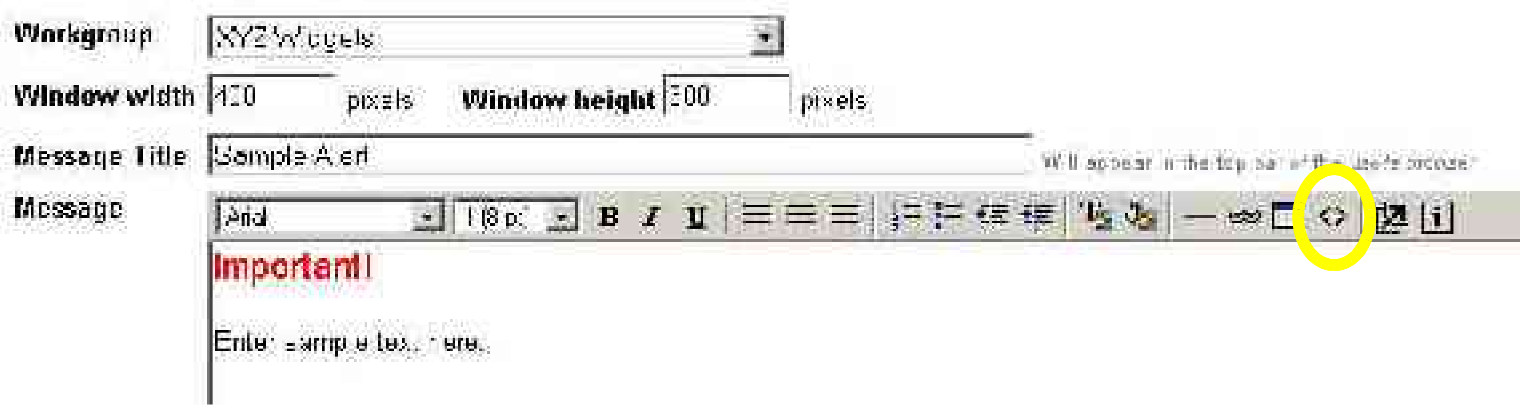

Figure 2: WYSIWYG Text Editor

Creating and activating a new message will trigger the pop-up message for all users upon login; a hyperlink will also be displayed on the Home page for each user in that workgroup. Both the pop-up window and the hyperlink to the message on the Home page will be displayed until the user checks the box to turn them off or the message is made inactive by the Administrator.

To Create a New Message: From any page, select Administration in the top navigation bar and then click on Workgroup Messaging to launch the message interface (see **Figure 1**). If you have access to multiple workgroups, start by making sure that the workgroup for which you wish to create the message is displayed in the Workgroup drop-down box (messaging is workgroup-specific). If a message is already Active, click the orange **Cancel Message** tab above to cancel the current message. Enter a Subject for the message (this will appear as the page Title of the browser window). Then enter the new or revised message text in the message box using the text tool to add formatting. Modify the window size to define the size of the pop-up window your users will see containing this message. Use the orange **Preview Message** tab to ensure that the message is displayed as desired. Click **Update Message** to submit the changes. Finally, click **Activate Message**; the message will appear in a pop-up window for each user when they log into the system.

__**Making Changes to an Active Message**__

Updating an active message will display the updated message to all users who still have the current message pop-up window active. To determine whether a message is active or inactive, refer to the **Status** field at the top of the messaging window (see **Figure 1**).

To Update an Active Message: in the Workgroup Messaging interface, make the necessary changes to the copy in the text box as well as the title and/or window size, if necessary. You can use the **Preview Message** button just as you would with a new message. To launch the changes, click the orange **Update Message** button.

Canceling an Active Message

Once an active message is canceled, it will no longer be displayed for any of the users for that workgroup. However, the text will be saved in the text box until it is updated or deleted so that it can be re-used for a future message if needed.

To Cancel an Active Message: If a message is Active, as shown in the Status field of the Workgroup Messaging area, click the **Cancel Message** button. This will deactivate the current message. The Status field will then display "Not Active."

Notes on HTML Formatting

The text tool integrated into the Workgroup Messaging area provides an easy-to-use WYSIWYG tool for formatting the message text, including defining font type, style, size and color. You can also use the clickable icons to insert tables or add email or URL hyperlinks. Alternately, you can enter HTML code directly into the text area HTML. To enter HTML code directly, click on the "< >" icon in the text area toolbar to view the HTML source code (this icon is the third from the right; see **Figure 2**). However, please note that the <body> and <html> tags will not apply to the pop-up window.

If you wish to include images in your workgroup message, the HTML tags for the images must be referenced using an absolute URL which points to the location of the image on your company's own server (or elsewhere on the internet).

Note on access privileges: Access to the Workgroup Messaging feature requires an advanced logon privilege. If you are an Administrator and require access to this feature, please contact your Contact Tracking account manager or send an email to support@contacttracking.com stating the specifics of your request.