Directed Communications Quick Reference Guide

View the complete user guide and additional support material:
- Directed Communications for Healthcare: https://portal.covisint.com/web/supporthc/dc
- Directed Communications for Manufacturing: https://portal.covisint.com/web/supportauto/dc

Table Of Contents

Roles and Responsibilities

This help product describes the Directed Communications tasks that can be performed by various user roles. You may not be able to perform some of the tasks, depending upon your assigned roles.

- All tasks described in this help selection are role-based.
- **Each role includes Reader role capabilities.** Users with Author, Editor, or Community Admin (administrator) roles can also perform the tasks available for the Reader role, so all users should review the Reader help topics. For example, if you are assigned the role of Editor, you should review the Reader and the Editor help sections.

The following table lists the tasks performed by each user role:

Reader[1]	Author	Editor	Community Admin
• Access bulletins • Read bulletins • Search for bulletins • Search archives • Manage subscriptions	**Reader tasks +** • Compose bulletins • Manage pending bulletins (created by self) • View bulletins read audit reports	**Reader tasks +** • Approve/reject bulletins • Bulk approve bulletins • Edit pending bulletins • Manage subscriptions • Retract active bulletins	**Reader tasks +** • Manage categories • Manage subcategories • Manage user roles

[1]All registered portal users receive "Reader" access to Directed Communications. While "Reader" is not an assignable role, the privileges are described in the above table for informational purposes.

ALL USERS (READERS)

Accessing Directed Communications

1. Navigate to your portal login screen.
2. Enter your *User ID* and *Password*, then click **Login**.
3. Click **Directed Communications** in the top navigation menu. The Directed Communications page displays within your portal window.

RESULT:

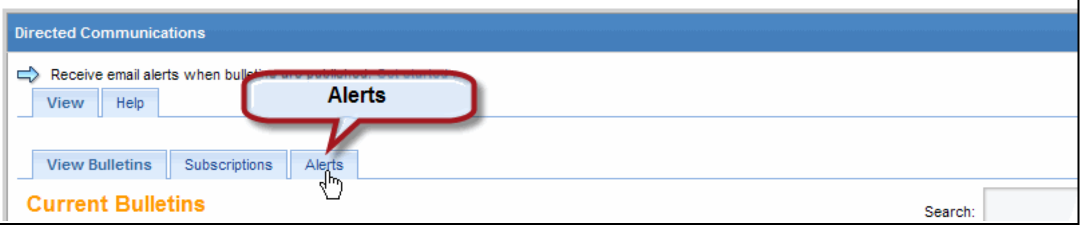
You have successfully logged in to and accessed Directed Communications.

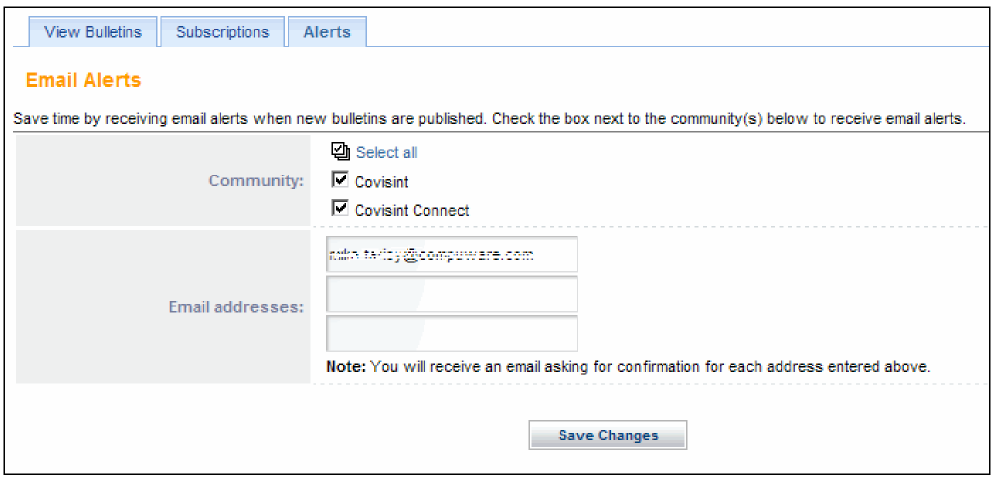
Setting Alerts

You can set alerts for bulletin communications. If you set alerts, you will receive email notifications each time a bulletin is published within a community you selected.

1. Click **Alerts**. The **Alerts tab** displays.

Where is the Alerts tab?





2. Click **Select all** to enable alerts for all communities, or select the check box of each community for which you want to receive bulletin publication email alerts.
3. In the **Email addresses** text fields, type the email addresses at which you want to receive alerts. You can enter up to three addresses.
4. Click **Save Changes.**

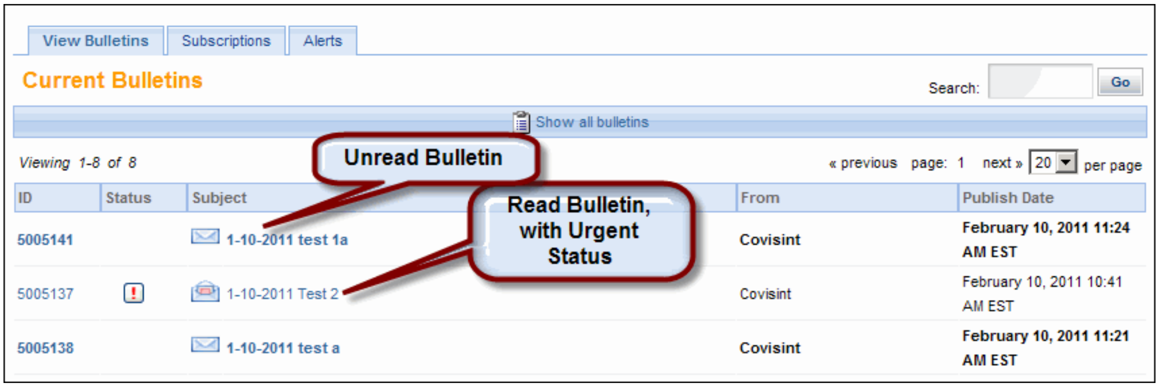
The system will send a confirmation email to each address you entered. You will not receive email alerts at an address until you validate it by opening its confirmation email and completing the enclosed steps.

RESULT:

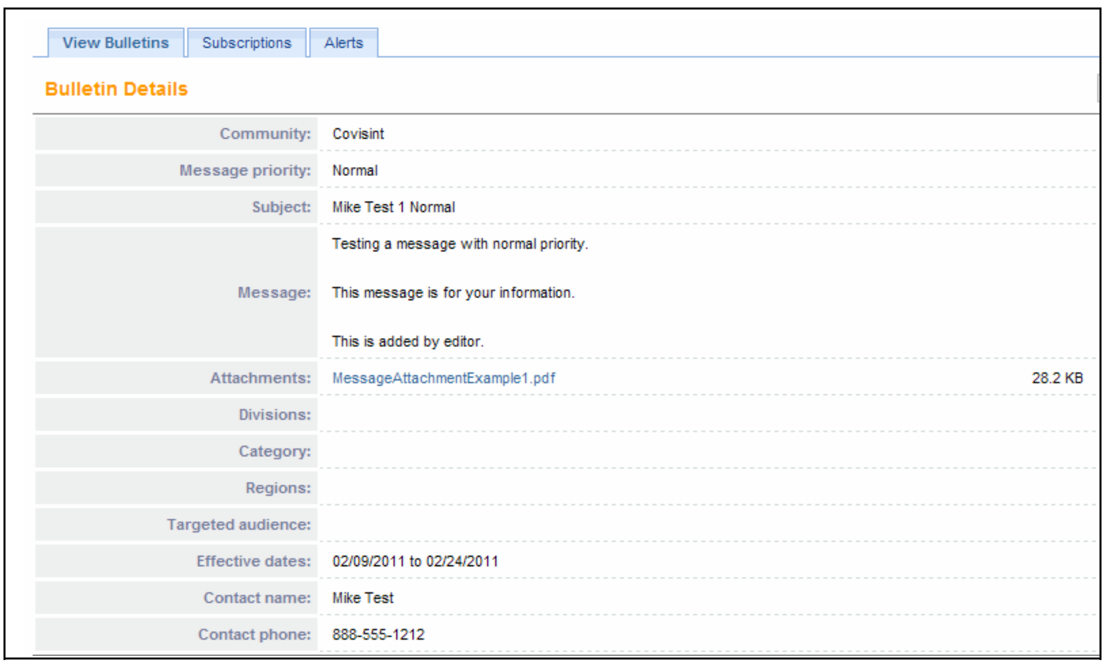
You have successfully configured email alerts.

Reading a Bulletin

Unread messages are identified with a sealed envelope icon, and bold font. Once read, the envelope icon is 'opened' and the font is no longer bold.



1. Click the **Subject** of the bulletin you want to read. The **Bulletin Details** view displays.



2. Read the bulletin. The message of the bulletin is displayed in the Message field. Additional details are also listed.
3. Click **Back** when you have finished reading the bulletin.

Bulletins are displayed by date and priority.

RESULT:

You have successfully read a bulletin.

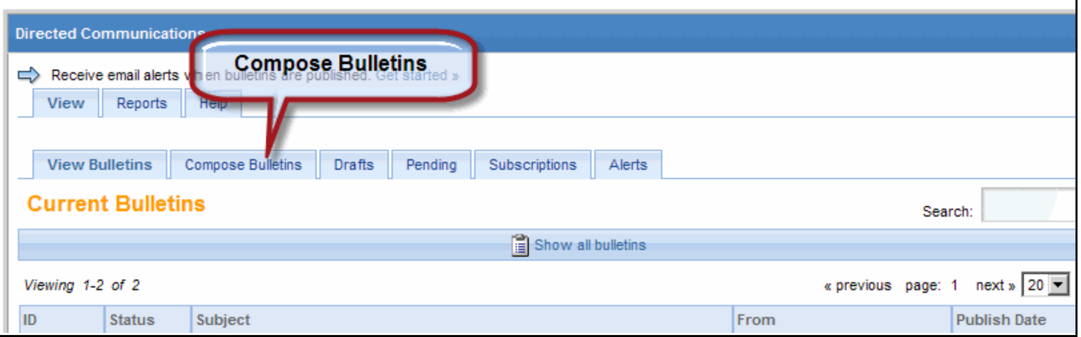
AUTHOR

Composing Bulletins

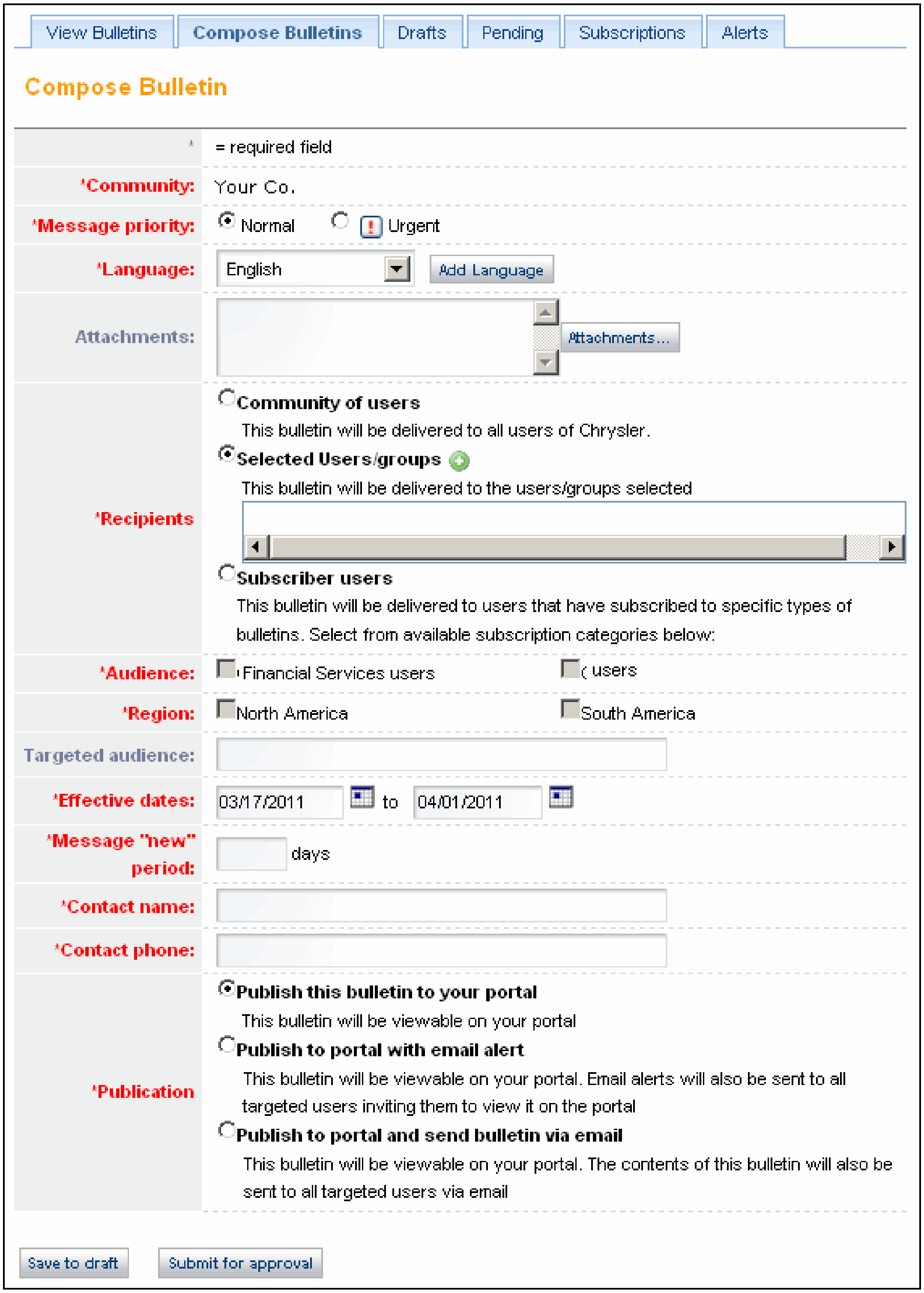
Important: The process for composing bulletins varies, depending upon your organization's implementation. If the procedure refers to fields or actions that are not supported by your implementation, skip to the next section of the procedure. If you overlook required fields, the system will prompt you to complete them.

1. From the **View** tab, click **Compose Bulletins**. The Compose Bulletin screen displays.

Where is the Compose Bulletins button?



   a. If the system does not populate the Community field, select a community from the drop-down list.



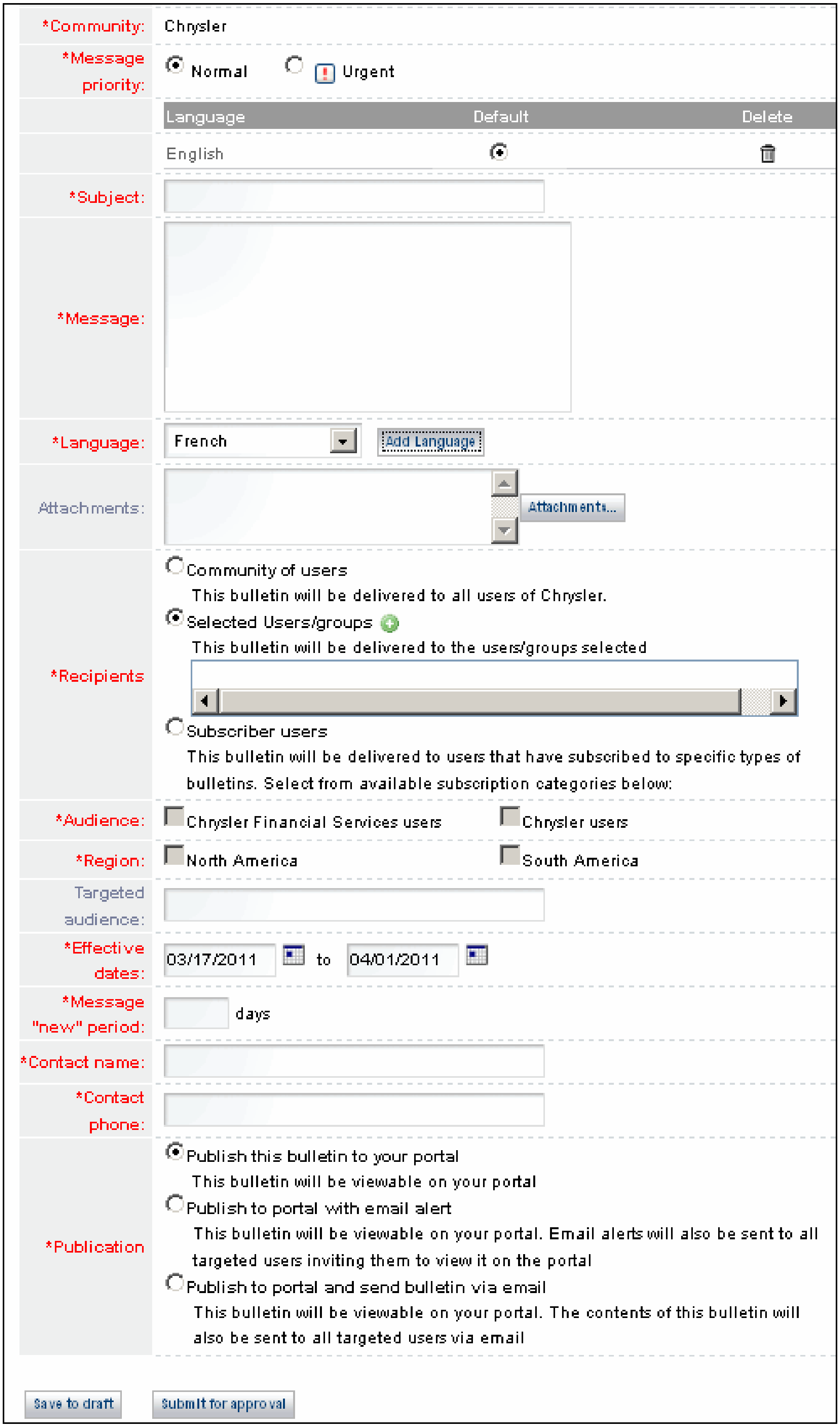
2. Click either the **Normal** or **Urgent** radio button to determine message priority.

- If you select *Urgent*, the received message is marked with an icon.
- When messages are received, they are sorted first by chronological

order, then by alphabetical order of the subject.

3. If your organization does not use the language option, skip to step 6. If the Add Language option displays, continue with the next step.
4. From the Language drop down menu, select the language in which you will create this bulletin, then click **Add Language**. The Subject and Message fields are displayed for entry, similar to the following screen shot.

If your organization uses languages, the Subject and Messages fields do not display until you select a language.



*Community:	Chrysler
*Message priority:	Normal Urgent

Language	Default	Delete
English		

*Subject:

*Message:

*Language: French Add Language

Attachments: Attachments...

*Recipients

Community of users

This bulletin will be delivered to all users of Chrysler.

Selected Users/groups

This bulletin will be delivered to the users/groups selected

Subscriber users

This bulletin will be delivered to users that have subscribed to specific types of bulletins. Select from available subscription categories below:

*Audience: Chrysler Financial Services users Chrysler users

*Region: North America South America

Targeted audience:

*Effective dates: 03/17/2011 to 04/01/2011

*Message "new" period: days

*Contact name:

*Contact phone:

*Publication

Publish this bulletin to your portal

This bulletin will be viewable on your portal

Publish to portal with email alert

This bulletin will be viewable on your portal. Email alerts will also be sent to all targeted users inviting them to view it on the portal

Publish to portal and send bulletin via email

This bulletin will be viewable on your portal. The contents of this bulletin will also be sent to all targeted users via email

Save to draft Submit for approval

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5. In the *Subject* field, type the subject of the bulletin. This text will display in the Subject column in the list of Bulletins.
6. In the *Message* field, type the message you want to send.

Optional: You can compose and spell-check your message in your preferred editor, such as Microsoft Word, then copy and paste it into the message window.

7. If you want to create the bulletin in additional languages, and your organization is configured to use the language options, then repeat steps 5-7 as required. (The system does not perform the translation of the text for you. You must provide the translations as necessary.)
    a. If multiple languages are created for a bulletin, identify the default language by selecting the DEFAULT radio button next to the appropriate language option.

The system does not perform text translation for you. You must provide the translations as necessary.

8. If desired, you can include attachments that all targeted bulletin recipients can view from your bulletin.

If your bulletin uses multiple languages, you will be prompted to associate each attachment with a language.

    a. Click **Attachments**. The Manage Attachments dialog displays.
    b. In the *Manage Attachments* dialog, click **Browse**, and use your PC's operating system to locate and open a file to attach.
    c. If your organization uses multiple languages, select the language in which the attachment was created from the drop-down menu. Click **Add**. The file is added. Repeat steps b and c as required to add other attachments.
    d. Click **Save and close window**. The attachments are added to your bulletin.
9. In the Recipients section, click the radio button of the group to which you want to broadcast the bulletin.

Important: The available selections vary, depending upon your organization's implementation.

    a. **Community of users** sends the bulletin to all the users in your portal community.
    b. **Selected users / groups** refers to all users you explicitly identify. Click next to "Selected users/groups" to display the User Directory window, where you can search for and select the people or groups to which you want to send a message.
        i. Type the name (or partial name) of the user or group in the **Type in name** field.
        ii. If you want to restrict your search, click the **Include** drop-down arrow and select a filtering option from the list. The default selection is **All** - all users and groups available on your portal will be searched for the data you entered in the *Type in name* field.

iii. Click **Find**. The screen refreshes, and the search results display.

iv. Select the check box of each user or group to which you want to send the message.

v. Click **OK**. The User Directory window closes and the selections display in your message.

c. **Subscriber users** sends the bulletin to only those users whose subscriptions match the criteria you set for the bulletin (for details about subscriptions, see Managing Your Subscriptions). When you select *Subscriber users*, you must also make additional selections, depending upon your organization's implementation. The screen shot in step 5 illustrates required selections where the Administrator has created "Audience" and "Region" categories.

10. Optionally, type a description of the targeted audience in the *Targeted Audience* field.

Text you type in the *Targeted Audience* field will be displayed just below the **Subject** in the *View Bulletins* screen. The text can help bulletin viewers decide if they need to read the message.

11. Click the **calendar icon** and set the effective dates for this message. These dates define the date range during which the bulletin will be listed in the *Current Bulletins* view. After this time elapses, the message is moved to the *Archived Bulletins* view.
12. In the *Message new period* field, type the number of days that you want the NEW icon to be displayed next to your message.
13. In the *contact name* field, type the name of the contact person for the message.
14. In the *contact phone* field, type the contact person's telephone number.
15. Click the radio button for the publication method you want to use. If publication methods are not displayed, skip to the next step.

If you select Publish to portal and send bulletin via email, you may not have an accurate record of users that have or have not read the bulletin. The Bulletins Read Audit Report can only track results for users who read bulletins while they are logged in to the system. The report does not include users that read a bulletin via their email system.

16. When you are finished with the bulletin:
    - Click **Save to draft**, if you want to return to work on the bulletin later..
    - Click **Submit for approval**, if you want to send the bulletin to an editor for publication approval. The bulletin will not be sent until it is approved by an editor.

- If you clicked *Save to draft* - proceed to Managing Draft Bulletins.
- If you clicked *Submit for approval* - the editor will review the bulletin, and you will be notified by email of the editor's decision.

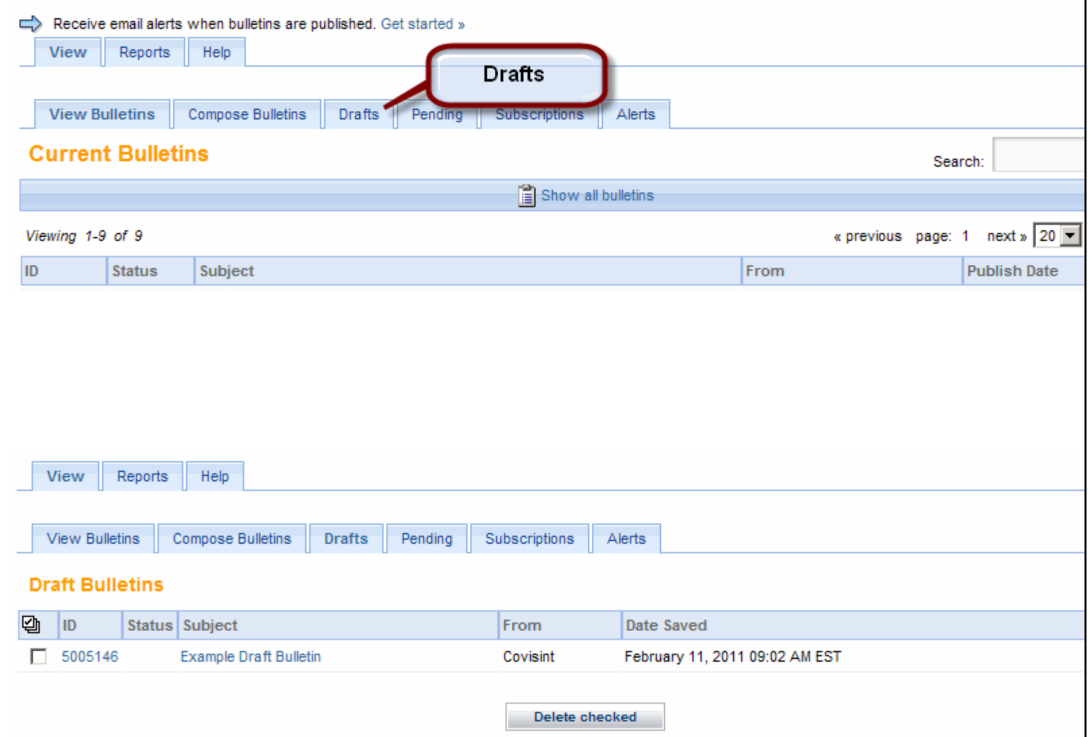
RESULT:

You have successfully composed a bulletin.

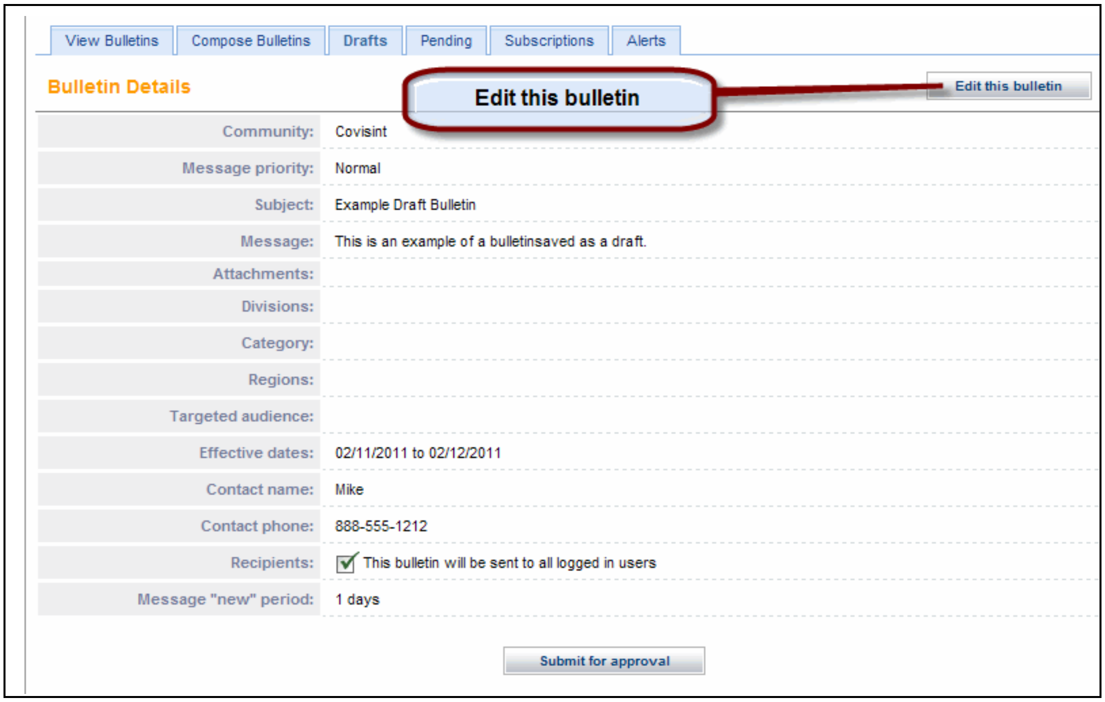
Submitting a Draft Bulletin

1. From the View tab, click **Drafts**. The **Draft Bulletins** tab displays.

Where is the Drafts tab?



2. Click the *bulletin ID* or *Subject* to open the bulletin. The **Bulletin Details** screen displays.



3. Click **Edit this bulletin.** The *Compose Bulletin* screen displays.
4. Edit the bulletin as required, or skip to the next step to submit the bulletin.
5. Click **Submit for approval**. The bulletin is transferred to an Editor for approval.

RESULT:

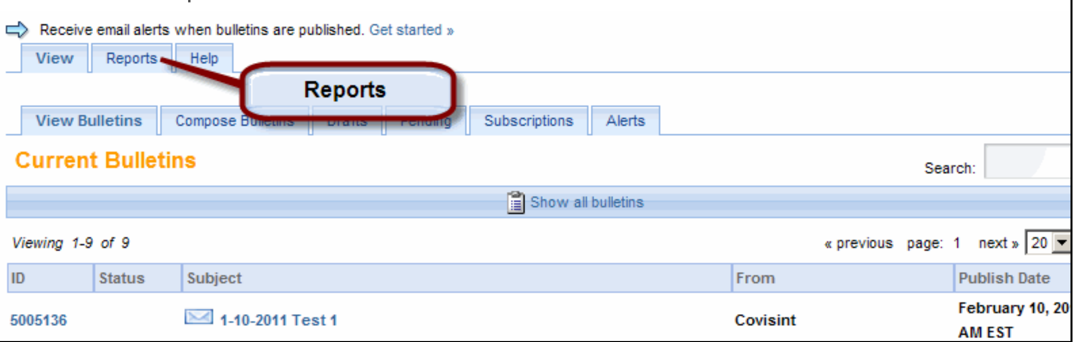
You have successfully submitted a draft bulletin.

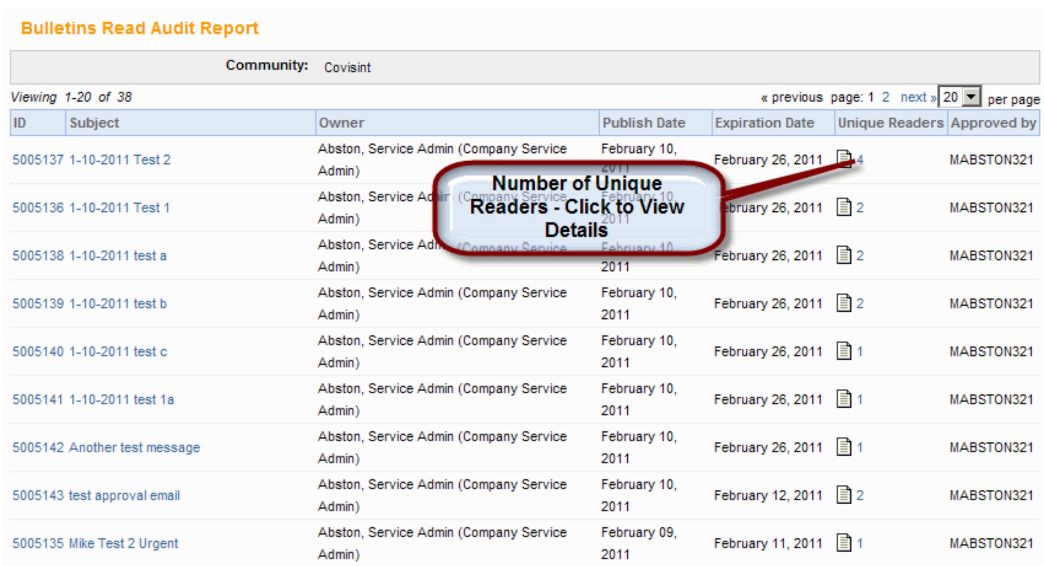
Viewing the Bulletins Read Audit Report

Complete the following steps to view which users have or have not read your bulletin (Depending upon the pulishing options selecting during Bulletin Creation).

1. Click **Reports**. The **Bulletins Read Audit Report** screen displays a list of all bulletins. The list displays the following information for each bulletin:
   ID
   - *Subject*
   - *Owner*
   - *Publish Date*
   - *Expiration Date*
   - number of *Unique Readers*
   - *Approved by*

Where is the Reports tab?





ID	Subject	Owner	Publish Date	Expiration Date	Unique Readers	Approved by
5005137	1-10-2011 Test 2	Abston, Service Admin (Company Service Admin)	February 10, 2011	February 26, 2011	4	MABSTON321
5005136	1-10-2011 Test 1	Abston, Service Admin (Company Service Admin)	February 10, 2011	February 26, 2011	2	MABSTON321
5005138	1-10-2011 test a	Abston, Service Admin (Company Service Admin)	February 10, 2011	February 26, 2011	2	MABSTON321
5005139	1-10-2011 test b	Abston, Service Admin (Company Service Admin)	February 10, 2011	February 26, 2011	2	MABSTON321
5005140	1-10-2011 test c	Abston, Service Admin (Company Service Admin)	February 10, 2011	February 26, 2011	1	MABSTON321
5005141	1-10-2011 test 1a	Abston, Service Admin (Company Service Admin)	February 10, 2011	February 26, 2011	1	MABSTON321
5005142	Another test message	Abston, Service Admin (Company Service Admin)	February 10, 2011	February 26, 2011	1	MABSTON321
5005143	test approval email	Abston, Service Admin (Company Service Admin)	February 10, 2011	February 12, 2011	2	MABSTON321
5005135	Mike Test 2 Urgent	Abston, Service Admin (Company Service Admin)	February 09, 2011	February 11, 2011	1	MABSTON321

2. Click a number in the Unique Readers column to view the *Bulletins Read Audit Details Report* for that bulletin. The details report displays information about each unique bulletin reader.
3. Click **Back** to return to the *Bulletins Read Audit Report* when you are finished viewing unique reader information.

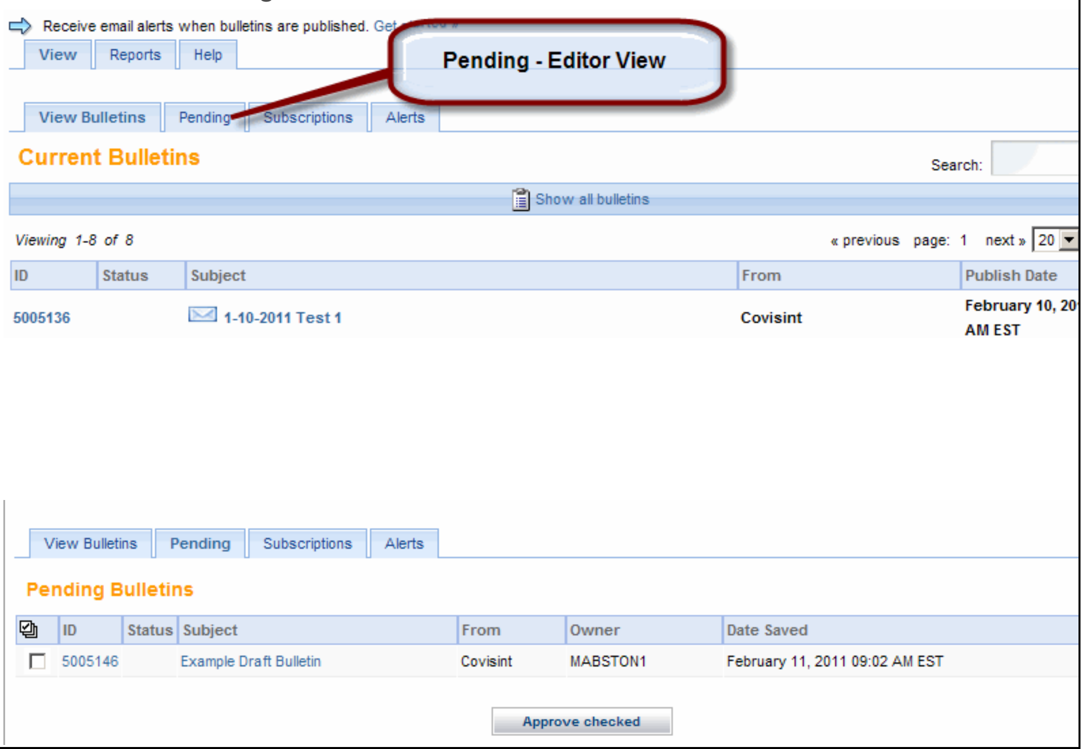
RESULT:
You have successfully viewed the Bulletins Read Audit Report.

EDITOR

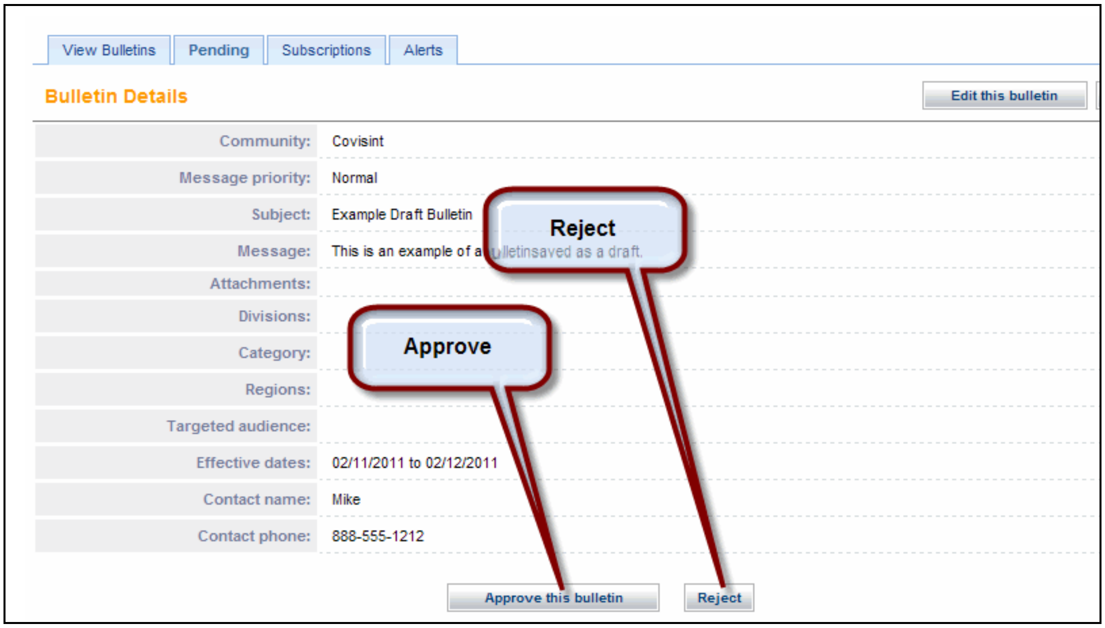
Approving and Rejecting Bulletins

1. From the View tab, click **Pending**. The **Pending Bulletins** screen displays the list of submitted bulletins that have not been approved or rejected.

Where is the Pending tab?



2. Click a bulletin's **ID** or **Subject name** to open the first bulletin you want to review. The **Bulletin Details** window displays.



3. Review the entire bulletin, including all its text and its distribution settings. If you want to modify the bulletin, see Editing Pending Bulletins.

- If you want to approve the bulletin, click **Approve this bulletin**.
- If you want to reject the bulletin, click **Reject**.

The screen refreshes and the bulletin is no longer in the pending queue.

RESULT:

You have successfully approved or rejected a bulletin.

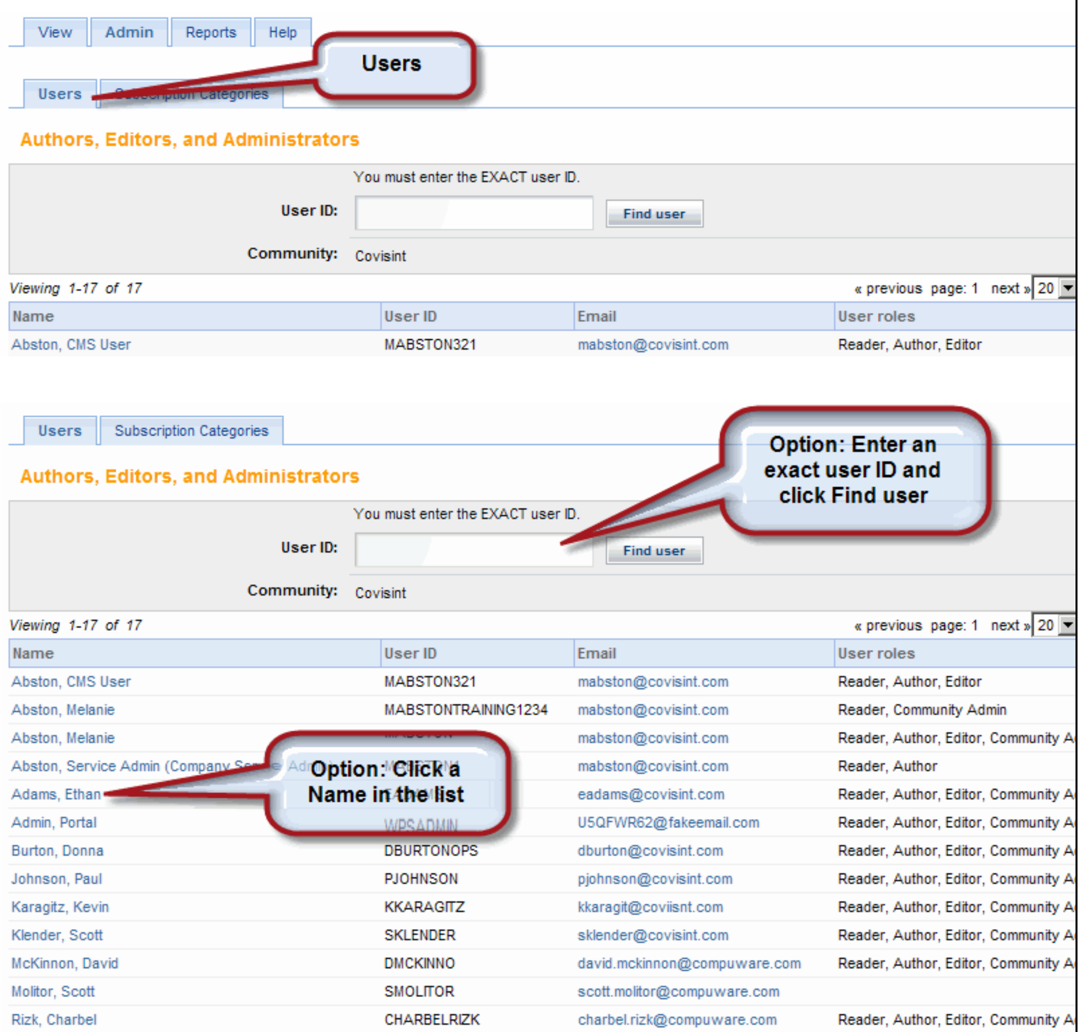
COMMUNITY ADMIN

Managing User Roles

All registered portal users receive "reader" access to Directed Communications. Directed Communications users with the Community Admin role can add or remove other roles, once users are registered. For more details about how system tasks are related to roles, see Roles and Responsibilities.

1. Click the **Admin** tab, then click **Users**. The **Authors, Editors, and Administrators** screen displays.

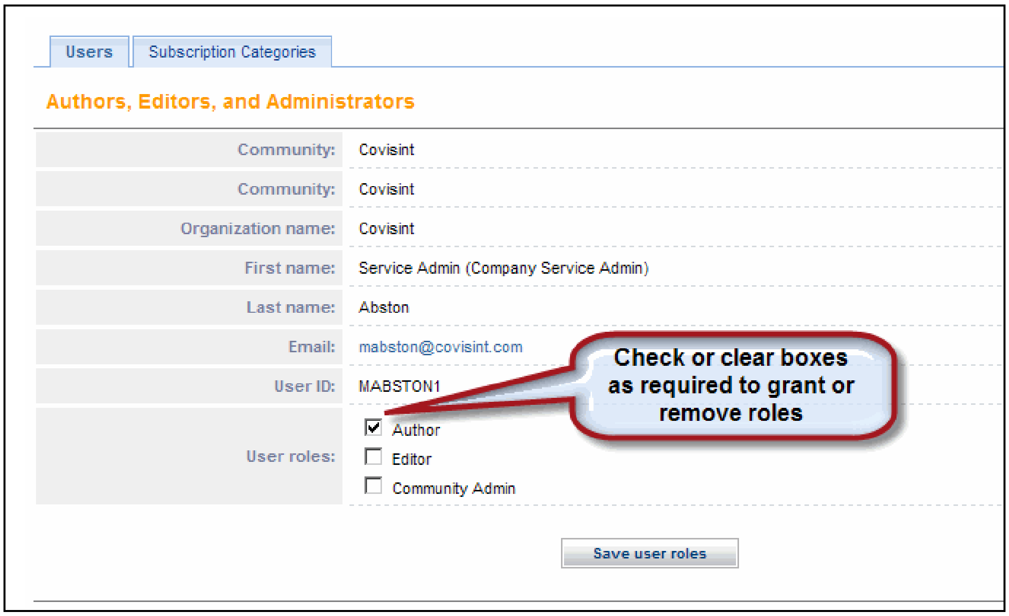
Where is the Users tab?



2. Select the user whose roles you want to manage. You can:
    a. Search for a user. In the User ID field, type the *User's ID* and click **Find User**

> You must key in the complete user id. The system will not accept partial names. A user must be registered in the portal in order to added to Directed Communications.

    b. Select a user. Click a user's **Name** in the displayed list. This option is available only for users who are assigned at least one role in addition to the standard Reader role. The **details screen** for the selected user displays.



- Select the check box of each role you want to allow for this user.
- Clear the check box of each role you want to remove from this user.

3. Click **Save user roles**.

RESULT:

You have successfully modified user roles.