

# **User Account Messenger**

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Tool Search: User Account Messenger

The User Account Messenger tool allows you to send Campus user account-related emails to a specific set of people based on search criteria or Ad hoc filter.

The article explains the following:

- Prerequisites
- Building and Sending an Account Message
- User Account Messenger Examples/Scenarios
  - Build Activation Messages for Newly Imported/Created Campus Portal Accounts
  - Remind Staff their Campus Portal Account is About to Expire
  - Informing Users of Newly Created User Accounts
  - Establishing a Recurring User Account Activation Message
  - Parent Has No Account and Needs to Create One

A primary function of this tool is its ability to email user account activation messages to users without Campus Portal accounts or who have recently had a user account created via the User Account Batch Import Tool or Account Security Preferences.

For staff accounts created via the User Account Batch Import Tool or Account Security Preferences, this tool may be used to email notifications by using a staff member's individual search or a Census/Staff based Ad Hoc filter and bypassing the activation URL and expiration date.

User Account Messenger ☆	User Management > User Account Administration > User Account Messenger
User Account Messenger	
The User Account Messenger will send security account-related messages to Messenger contacts selected in the filter criteria section below. You can select between a generic Student, Staff or Pare can select amongst the student or person (Census/Staff) based Ad Hoc filter or utilize an additional Additional functionality includes the ability to generate messages with a unique account activation the filter criteria section below and will always be required when the uniqueLinkActivationURL Can for more detailed information. As with the standard Messenger functionality, the Template Name and User/Group can be change scheduled for automatic delivery in the User Account Messenger Scheduler tool.	nt/Guardian with a force change password setting or a specific expiration date filter, or you I auto-generated guardian selection which is based upon a student based Ad Hoc filter. URL and an expiration date for the end user to log on. This expiration date can be set in puss field is selected in the Messenger editor. Please see the associated help for this tool
User/Group User V Template <new> Save Co</new>	ay Delete
Enter the filter criteria for User Account Builder:	
Deliver to:	
O Individual Search	
O Student	
Staff Member	
Parent/Guardian	
Force Change Password	
Expiration Date	

Image 1: User Account Messenger Tool

# Prerequisites

- Filters need to be created within Filter Designer.
- If sending Campus account activation messages using an import file Ad hoc filter, a file must first be imported via the User Account Batch Import Tool.



# **Building and Sending an Account Message**

The following steps will walk you through the process of building and sending a user account message:

- Step 1. Select a Template
- Step 2. Enter Filter Criteria
- Step 3. Enter an Account Activation URL Expiration Date
- Step 4. Create the Message
- Step 5. Test the Message
- Step 6. Preview and Send the Message

## Step 1. Select a Template

The first step in this process is to select an existing user account messenger template or create a new template (see Image 2).

If an existing template is selected, review Steps 2-4 and begin Step 5.

If a new template is being created, select **<new>** from the **Template** field and proceed to Step 2.

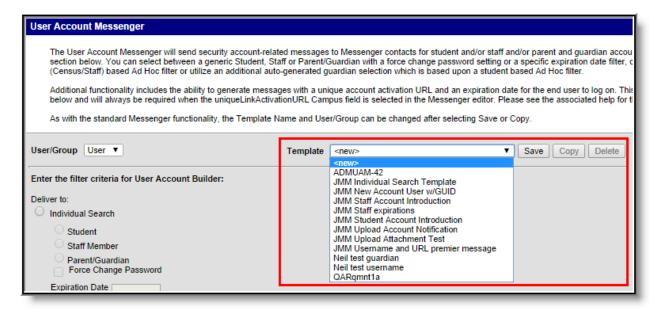


Image 2: Selecting a Template

## Step 2. Enter Filter Criteria

The next step is enter filter criteria. This will determine which Campus users will receive the email message. Use the table below for help in understanding each option.

Enter	the filter criteria for User Account Builder:
Delive	er to:
0	Individual Search
	O Student
	O Staff Member
	O Parent/Guardian
	Force Change Password
- 1	Expiration Date
0	Student based Ad Hoc Filters
	Ψ
0	Census/Staff based Ad Hoc Filters (Portal Accounts)
	Y
00	Census/Staff based Ad Hoc Filters (Staff Accounts)

Image 3: Entering Filter Criteria

Field	Description
Individual Search	<b>Student -</b> If selected, email messages will be sent to all students within the calendar selected in the Campus toolbar.
	<b>Staff Member -</b> If selected, email messages will be sent to all staff members within the calendar selected in the Campus toolbar.
	<b>Parent/Guardian -</b> If selected, email messages will be sent to all guardians of students with a current or future enrollment record in the selected calendar.
	<b>Force Change Password -</b> If marked, only students, staff members or parent/guardians who have not completed a pending change password request will be sent an email. This option is especially useful for routinely sending out email reminders to these users.
	<b>Expiration Date -</b> Only users whose accounts are expiring on this date will be sent the message. This is useful for sending reminder emails to these users.
Student	Only students meeting this filter's criteria will be sent the message.
based Ad Hoc Filters	You can build effective user account-related filters using the Ad Hoc Reporting Query Wizard .
Census/Staff	Only staff members with a Homepage set to 'Portal' will be sent the message.
based Ad Hoc Filters (Portal Accounts)	You can build effective user account-related filters using the Ad Hoc Reporting Query Wizard.
Accounts)	Selecting this option when building Activation URL messages means the messages will only go to users with a Homepage set to 'Portal' (System Administration > Users > User Account > Homepage) and only staff Portal accounts will be activated.



Field	Description
Census/Staff based Ad Hoc	Only staff members with a Homepage set to 'Campus Application' or 'Campus Instruction' will be sent the message.
Filters (Staff Accounts)	You can build effective user account-related filters using the Ad Hoc Reporting Query Wizard. Selecting this option when building Activation URL messages means the messages will only go to users with a Homepage set to 'Campus Application' or 'Campus Instruction' (System Administration > Users > User Account > Homepage) and only staff Campus Application accounts will be activated.
Guardians of Student based Ad Hoc Filters	Only guardians of students meeting this filter's criteria will be send the message. You can build effective user account-related filters using the Ad Hoc Reporting Query Wizard.

# Step 3. Enter an Account Activation URL Expiration Date

Once filter criteria has been entered, determine if the message you are creating will contain the **accountManagement.uniqueLinkActivationURL** campus field. If so, the date entered in this field will determine when the unique URL generated within the message will expire. This field will automatically default to 5 days from the current date unless modified.

The **accountManagement.uniqueLinkActivationURL** field generates a unique Campus Portal user account activation URL which email recipients can select to activate their newly created Campus Portal user account. This is especially useful for sending out messages to all users who have had Portal accounts recently created via the User Account Batch Wizard.

See the Building Activation Messages for Newly Imported/Created Campus Portal Accounts section for an example of this feature.

O Guardians of Student based Ad Hoc Filters ▼	
Account Activation URL Expiration Date: 09/07/2014	
Sender's Email: I @infinitecampus.com	

Image 4: Entering an Account Activation URL Expiration Date

# Step 4. Create the Message



Now it is time to create the message being sent. First, enter the **Sender's Email** address and **Message Subject**. This is the email address and email subject that will appear for each recipient.

This field will default to the value entered in the **Default Sender Email Address** field found on the Email Settings tab. This field will be read-only unless the **Allow Custom Sender's Email Address** checkbox is marked on the Email Settings tab.

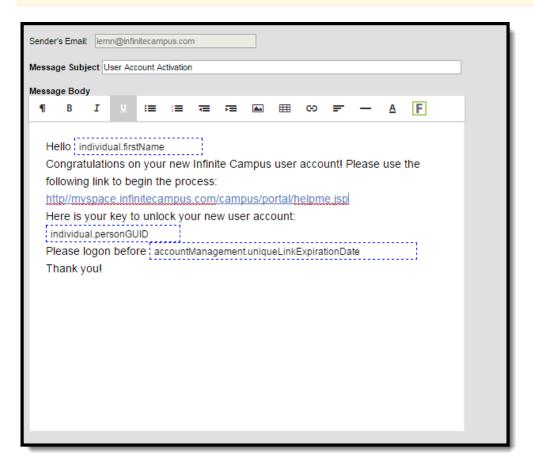


Image 5: Creating the Message

Begin to write your message in the Message Body. The message body is a WYSIWYG editor which provides standard text formatting as well as the ability to enter Campus Fields. Campus fields are accessed by selecting the small icon in the upper right-hand corner allow you to generate specific Campus data within the message which will report uniquely for each message recipient (see Image 6).

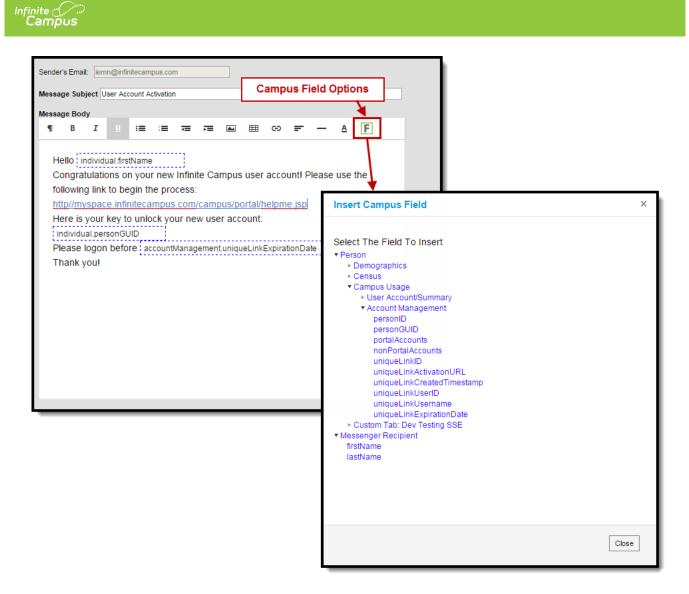


Image 6: Inserting Campus Fields

For example, in the image below, Campus fields **individual.firstName**, **individual.personGUID** and accountManagement.uniqueLinkExpirationDate are inserted into the message.

When this message is generated, the individual.firstName field will state the recipient's first name, the individual.personGUID will state the recipient's GUID and the accountManagement.uniqueLinkExpirationDate field will indicate when the account activation window will expire (see Image 7).

Infinite C Campus
Sender's Email:       lemm@hinitecampus.com         Message Subject       User Account Activation         Message Body:       Image: Imag
Hello Nate       Congratulations on your new Infinite Campus user account! Please use the following link to begin the process: <u>http://myspace.infinitecampus.com/campus/portal/helpme.jsp</u> Here is your key to unlock your new user account:         01245212542         Please logon before 10/01/14         Thank you!

Image 7: Example of Inserted Campus Fields

If you like to attach a file to the message, click the **Choose File** button and locate the file on your hard drive or network. Once selected, click the **Upload** button (see Image 8)

If you need to attach multiple files, attach a Zip file.
Browse and upload an email attachment Choose File ICCS RTI alignment.xlsx Upload Delivery Date: 09/08/2014 Send Emails at: 01:21 PM

Image 8: Attaching a File to the Message

# Step 5. Test the Message

Now that filter criteria has been established and the message has been created, it's time to test the



message before sending it out to users. To test the message, click the **Test** icon. The Send Test Message window will appear, asking you to designate a **Destination Email**, or where you'd like the test message to be sent so that you can ensure it appears correctly and click the Send Test button (Image 9).

Browse and upload an email attachment Choose File No file chosen Upload	
Delivery Date: 09/05/2014	
Send Emails at: 10:34 PM	
Test Preview/Send	Send Test Message 🗙
	Please fill in an email address to send a test email. Destination Email: test@infinitecampus.com
*	
	Cancel Send Test

Image 9: Testing the Message

Below is an example of a test message received using the message created in Image 7.

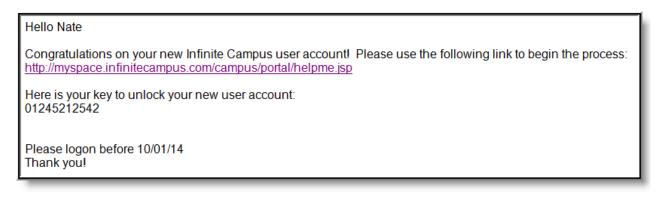


Image 10: Example of a Test Message

## Step 6. Preview and Send the Message

If the test message appears correctly and you are ready to send the message, determine the **Delivery Date** (the date the emails will be sent) and the time during the delivery date in which the message should be sent (**Send Emails at**).

Click the **Preview/Send** button. The Preview Message window will appear, describing the amount of email recipients and providing you with the ability to review these recipients by clicking **Review Recipients** (see Image 11).

Delivery Date: 09/05/2014		
	Test Preview/Send	
	Preview Message Click Review Recipients to vi Click Send Message to delive	ew the people and devices.
	Recipient Count Email Count	15 15
	Can	cel Send Message Review Recipients

Image 11: Reviewing Message Recipients

Once Review Recipients is selected, an editor will appear listing each recipient and allowing you to unmark specific people you do not want to receive the message. You may also preview a specific person's message by clicking the small icon in the Preview column (see Image 12).

Review	Recipients	
	ar the checkboxes next to recipients or devices to prevent them from receiving the message. All eligible recipients display. However, only recipients with wing delivery devices displayed will receive the message: Process Inbox, email address, or a phone number (when Voice is enabled).	h any of the
Sele	ect Save & Return to retain any changes to recipients. Select Cancel to go back to Preview Message without saving changes.	
Save &	& Return Cancel	
	Message Preview	
	Recipient Name	
	Kari ✔ Kari@myisp.com	
	Davis Davis@myisp.com	
	Faiza ✓ Faiza@myisp.com	D
	Jama ✓ Jama@myisp.com	D
1	Caitlin	D
-		
	Message Recipient Preview	
	Recipient Name: Kari Device (1): Kari.@myisp.com	
	Subject: User Account Activation	
	Message Body: Hello Kari Congratulations on your new Infinite Campus user account! Please use the following link to begin the process: http://myspace.infinitecampus.com/campus/portal/helpme.jsp Here is your key to unlock your new user account: C098CFC1-35BF-4DD8-B764-F9E Please logon before 09/06/2014 Thank you!	
	Close	

Image 12: Previewing a Message

Once recipients have been reviewed and you are ready to send the message, click the **Send Message** button. The Preview Message window will appear, detailing the count of emails sent (see Image 13).

Click Review Recipier Click Send Message t		nessage.	
Recipient Count		15	
Email Count		15	
	Cancel	Send Message	Review Recipients
	Cancel	Send Message	Review Recipients
Preview Message		Send Message	Review Recipients
		Send Message	×
		V	×
To view message de		go to Sent Message L	×
To view message de Recipient Count		go to Sent Message L 15	×
To view message de Recipient Count		go to Sent Message L 15	×

Image 13: Sending the Message

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To review the status of this message request, see the Sent Message Log (Image 14).

ent N	/les	sage Log ·			Communicati	on > Messenger A	aministration > Se	nt Message L
Created B	etwee	n 04/04/2024 an	d 04/04/2024 Find Me	ssages				
				Sent Messag	e Log			
Status	\$	Message Type	District/School \$	Message Subject 🔷	Sender 🔶	Date Created	Date Scheduled 🛛 🗢	ScheduleID 🗢
	~	· ·	•					
				Sections				
Sent		1	Plainview Schools	New Scheduled Student in One of Your Sections	Administrator, ASystem	06/26/2024 1:33 PM	06/26/2024 1:33 PM	
Sent		1	Plainview Schools	New Scheduled Student in One of Your Sections	Administrator, ASystem	06/26/2024 1:32 PM	06/26/2024 1:32 PM	
Sent		1	Plainview Schools	New Scheduled Student in One of Your Sections	Administrator, ASystem	06/26/2024 1:32 PM	06/26/2024 1:32 PM	
Sent		1	Plainview Schools	New Scheduled Student in One of Your Sections	Administrator, ASystem	06/26/2024 1:32 PM	06/26/2024 1:32 PM	
Sent		1	Plainview Schools	New Scheduled Student in One of Your	Administrator, ASystem	06/26/2024 1:32 PM	06/26/2024 1:32 PM	

Image 14: Viewing the Sent Message Log

# **User Account Messenger Examples/Scenarios**



The following are examples of useful ways to use the User Account Messenger.

- Build Activation Messages for Newly Imported/Created Campus Portal Accounts
- Remind Staff their Campus Portal Account is About to Expire
- Informing Users of Newly Created User Accounts

# Build Activation Messages for Newly Imported/Created Campus Portal Accounts

Once user accounts are imported and created via the User Account Batch Import Tool, messages should be sent to these users directing them to activate their account.

### Step 1. Design an Activation Message

The first step in this scenario is to design an activation message. This message should include the following Campus fields:

- The accountManagement.uniqueLinkActivationURL field.
- The accountManagmeent.uniqueLinkExpirationDate field.
- A line about what the person should do if they fail to activate their account before the URL expiration date.

For example, in the image below (Image 15), a message was built including these items and an example of how this message will look once generated is shown.

Sender's Email: iemn@infinitecampus.com							
Message Subject User Account Activation							
Message Body							
Hello							
You can now logon to your new Infinite Campus user account!							
Here is your activation page:							
accountManagement.uniqueLinkActivationURL							
Please logon before accountManagement.uniqueLinkExpirationDate							
Thank you!							
Hello							
You can now logon to your new Infinite Campus user account!							
Here is your activation page: http://testURL.com/123565							
Please attempt to logon before or on 10/14/14							
Thank you!							



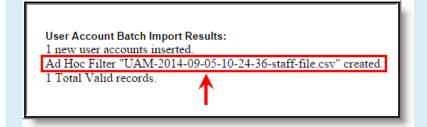
Image 15: Example of an Account Activation Message

### Step 2. Send Email Messages Using the Import Ad Hoc Filter

The next step is to send messages using the Ad hoc filter created when accounts were imported via the User Account Batch Import Tool and the message format created in Step 1. The filter will contain all users who had accounts generated via the import.

Filters created via an import are saved as UAM - the date and time the import was generated - the file name. For example, UAM-2014-08-13-12-35-23-file20.csv (see Image 16).

Upon import of a file, the Import Results Summary will list the newly created Ad hoc filter (see below).



Student Portal Accounts	Staff Portal Accounts				
If the accounts imported were student accounts, select the filter in the <b>Student based Ad Hoc Filters</b> field.	If the accounts imported were staff Portal accounts, select the filter in the <b>Census/Staff based Ad Hoc Filters</b>				
Enter the filter criteria for User Account Builder: Deliver to: Individual Search Student Staff Member Parent/Guardian Force Change Password Expiration Date Student based Ad Hoc Filters UAM-2014-09-05-10-24-36-staff-file.csv Census/Staff based Ad Hoc Filters (Portal Accounts) Census/Staff based Ad Hoc Filters (Portal Accounts) V	(Portal Accounts) field.				

Image 16: Example of an Import File Ad Hoc Filter

### **Remind Staff their Campus Portal Account is About to Expire**

Another useful scenario is generating a message for all staff whose Campus Portal accounts are about to expire.

In the example below, an Ad hoc filter was created finding active staff members with user accounts about to expire and a letter was created containing the username and account expiration date



## (Image 17).

Ad Hoc Query Wiza	rd - Field Selection
window. To remo	e for creating a filter for which logic and output formatting may be applied. Click a field within the All Fields window, or use th ve a field from the Selected Fields window, select the field(s) and click the back arrow < The output will sequence the fields Dutput Formatting screen. At least one field must be selected to continue.
Field Selection >	Filter Parameters > Output Formatting > Grouping and Aggregation
Short Description: Th	is Ad Hoc query will find persons with existing user accounts that expire shortly.
Select categories &	
userl perso distri userr allMo	Account/Summary     individual.personGUID       D     individual.stName       D     individual.firstName       ponID     pcontact.email       ctID     usage.username       name     contacts.guardian       odules     contacts.portal       lendars     usage.expiresDate
	Message Body
	¶ B I U ≔ ≔ ≂ ≂ ⊾ ⊞ ⇔ = − A F
	Hi there! Your user account is about to expire! Please be aware that you will no longer have access as of this date: usage.expiresDate Thank you, Administrator

Image 17: Creating an Account Expiring Filter and Message

Once the filter and message have been created, find the filter within the **Census/Staff based Ad Hoc Filters (Portal Accounts)** field and send the message (Image 18).

ite ( amj	ÓUS
Ente	er the filter criteria for User Account Builder:
Deliv	ver to:
0	Individual Search
	O Student
	Staff Member
	O Parent/Guardian
	Force Change Password
	Expiration Date
0	Student based Ad Hoc Filters
	<b>v</b>
۲	Census/Staff based Ad Hoc Filters (Portal Accounts) UAM-2016-09-26-17-22-47-jmm.csv ▼
0	Census/Staff based Ad Hoc Filters (Staff Accounts)
0	Guardians of Student based Ad Hoc Filters

Image 18: Selecting the Filter within the User Account Messenger Tool

### Informing Users of Newly Created User Accounts

You can inform all users who have a newly created user account or who have never logged into their user account to log into their account and update their account password. This scenario is especially useful for user accounts created automatically via Account Security Preferences or the User Account Batch Wizard.

In the example below, an Ad hoc filter was created which includes the total login count (usage.totalLoginCount) and if the account is flagged to require a password change (usage.forceChangePassword). These fields are important as can be combined with Filter Parameters to identify only those users who have a Campus user account who have never logged into their account and need to change their password (which will be the case for any accounts autogenerated via Account Security Preferences).

Use the following values to ensure a proper list is generated (see Image 19):

- usage.totalLoginCount
  - Operator: =
  - Value: 0
- usage.forceChangePassword
  - Operator: =TRUE

Ad Hoc Query Wizard - Field Selection	
Select fields to use for creating a filter for which logic and output formatting may be applie Function option to add the field to the Selected Fields window. To remove a field from the back arrow < The output will sequence the fields in the order selected; however, the se At least one field must be selected to continue.	Selected Fields window, select the field(s) and click the
Field Selection > Filter Parameters > Output Formatting > Grouping and Aggregation	
*Query Name: Users with a New User Account	
Short Description:	
Long Description:	±
Select categories & fields	
Filter By Search Clear	Selected Fields
E Student	usage.tortalLoginCount  usage.forceChangePassword
E Demographics E School Boundaries	student.firstName student.lastName
School Calendar      H     School	usage.username
÷ 	
Elearner     Elearner     Elearner     Elearner	
Ad Hoc Query Wizard - Filter Parameters	
Parameters are used to filter data based on specific logic. Use the open	ators to apply logic to designated fields. Logic r
not being output. Click the Add Field button to apply additional logic crite Expression (optional) to set conditions for the operators using AND, OR	ria to a single field already assigned an Opera , and NOT conditions. If a Logical Expression i
will be applied to all operators. If using Logical Expression, include all fie Field Selection > Filter Parameters > Output Formatting > Grouping an	
The second second	
*Query Name: Users with a New User Account	
Short Description:	
Long Description:	
Filter the data	
ID *Field Operator Valu	e 🗡
X <sup>1</sup> usage.totalLoginCount ▼ = ▼ 0	
X 2 usage forceChangePassword ▼ = TRUE ▼	
X <sup>3</sup> student.firstName V V	
X 4 student.lastName V V	
5 usage.username V V	
Add	

Image 19: Filter of Users Who Need to Log into their User Account

Once this filter is created, use the User Account Messenger to send a message to each one of these users.

This message should include the following Campus fields:

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- The accountManagement.uniqueLinkActivationURL field.
- The accountManagmeent.uniqueLinkExpirationDate field.



You should also enter an **Account Activation URL Expiration Date** (see Image 20). This is the date the unique activation URL contained in the message will expire. Users will need to select this URL prior to this date.

Filter criteria is important when sending this message. Only users who match the filter criteria selected (e.g., Student based Ad Hoc Filters, Census/Staff based Ad hoc Filters (Portal Accounts), etc) will receive the message and be able to activate their accounts.

#### For notifying Staff, please consider the following:

- If notifying staff of their newly created staff Portal accounts (System Administration > User Security > Users > User Account > Homepage = Campus Portal), use the Census/Staff based Ad Hoc Filters (Portal Accounts) filter option.
- If notifying staff of their newly created Campus Application accounts (System Administration > User Security > Users > User Account > Homepage = Campus Instruction OR Campus Application), use the Census/Staff based Ad Hoc Filters (Staff Accounts) filter option.

User Accou	int Messeng	er										
The User Account Messenger will send security account-related messages to Messenger contacts for student and/or staff and/or parent and guardian accounts based upon the criteria selected in the filter criteria section below. You can select between a generic Student, Staff or Parent/Guardian with a force change password setting or a specific expiration date filter, or you can select amongst the student or person (Census/Staff) based Ad Hoc filter or utilize an additional auto-generated guardian selection which is based upon a student based Ad Hoc filter. Additional functionality includes the ability to generate messages with a unique account activation URL and an expiration date for the end user to log on. This expiration date can be set in the filter criteria section below and will always be required when the uniqueLinkActivationURL Campus field is selected in the Messenger editor. Please see the associated help for this tool for more detailed information.												
User/Group	Heer			•	1	Tomplata				Conv	Delete	1
osenoioup	0361			•		Template	<new></new>		ave	Сору	Delete	
Enter the filt	er criteria for	User Ac	count B	uilder:								
Deliver to:												
	Search											
Stud	lent f Member											
	nt/Guardian											
	ce Change Pas	sword										
Expiratio	-											
· ·	pased Ad Hoc	Filtero										
	16-09-26-17-2		I.CSV	•								/
~	Staff based Ad			I Accounts)								
Census/S	Staff based Ad	Hoc Filte	rs (Staff	Accounts)						/		
Quardian	s of Student b	acod Ad	Hoo Filto						/			
Guardian	is or acquerit b	aseu Aŭ I	HOC FILLE	TS T			/					
Account Activation URL Expiration Date: 06/09/2017												
Message Subject User Account Activation												
Message Body												
¶ B	I U	:=	:= 3			III G	_		•	E		
<b>1</b> B	1 0	.=		= +=	-	ш (.	-	_	A	ľ		

te (/ ) Impus				
Hello! You now have a Campus user account! Below are your	r credentials:			
Please go to accountManagement.uniqueLinkActivationURL your account password.	and update			
You have until accountManagement.uniqueLinkExpirationDate to complete this process.				
Thanks!				
Delivery Date: 06/07/2017				
Test Preview/Send				

Image 20: Informing Users who Need to Log into Their User Account

### Establishing a Recurring User Account Activation Message

Once you have created and saved a user account activation message in the User Account Messenger tool (meaning you hit **Save** in the upper right-hand corner to save the message as a template), you can establish a daily, weekly, or monthly recurring message event using the User Account Messenger Scheduler.

User Account Messenger Scheduler ☆	User Management > User Account Administration > User Account Messenger Scheduler
User Account Messenger Schedules Administrators CampusAllCalsModifyRights Data Health Check	

Image 21: Establishing a Recurring User Account Activation Letter

For example, using a user account activation message template and setting to a frequency of daily, you can set the User Account Messenger Scheduler to send the user account activation email to any user accounts created in the last 24 hours and repeat this process every day within a certain timeframe.

See the User Account Messenger Scheduler article for more information about this process.



### Parent Has No Account and Needs to Create One

For assistance and steps on how a parent who has no account but is given an Activation Key can log in a create a new account, see the Getting Started - Campus Student and Campus Portal guide.

Users can also watch this video, which walks them through this process: Getting Started with Campus Parent and Campus Student - Video | Infinite Campus

This article also explains how users can log into the Campus Student/Campus Portal App, how to log in using a web browser, and how parents can turn on notifications.