

Messages

(Using your Taskstream Message Center)



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About the Message Center

The Message Center is an internal email Program that enables the exchange of messages with other Taskstream subscribers. The Message Center provides a way to compose, receive, read, store, reply to, and forward e-mails, attach documents, and create folders. You can also send Taskstream work, such as Rubrics and Lesson Plans, to other Taskstream users.

To access the Message Center and your Inbox

1. From the main navigation bar at the top of your screen, click **Communications**.
2. On the Communications homepage, click **Go to the Message Center**.
3. You are navigated to the *Messages* tab, which defaults to display all new and unread messages in your *Inbox*.
4. In the first column of the Messages table, new or unread messages are identified by a sealed envelope symbol , while previously read messages are tagged with an opened envelope symbol . For new messages, the *Subject* link displays in bold.
5. [To read a message](#), click the *Subject* link for that message.

Using the Messages tab

In addition to reading your messages, the Messages tab enables you to manage the messages you have received.

View Messages that are not in your Inbox

1. Select a folder name from the **Go to Folder** pull-down menu.
2. Click **Change**. The Messages table refreshes to display the list of messages in that other folder.

File Your Messages into a Folder

1. In the second column of the Messages table, select the message you want to file.
2. Select a folder from the **Move to Folder** pull-down menu.
3. Click **Move**. Taskstream automatically moves your message(s) and enables you to view the contents of that folder.

Delete Messages

1. In the second column of the Messages table, select the message(s) you want to delete.
2. Click **Delete Selected Messages**. Taskstream automatically moves your message(s) to the *Deleted* folder.

Messages may be accessed in the Deleted folder until you decide [to permanently delete them](#).

To access your folder of deleted items

1. Select the Deleted folder from the **Go to Folder** pull-down menu and click **Change**
OR
2. Go to the *Folders* tab and click the **Deleted** link

Other Message Center tabs

The other tabs of Message Center provide access to the following functions:

Click:	To...
Compose	Create and send a new message.
Folder	Manage your Message Center folders. This includes a tool that enables you to permanently delete messages you know longer need.
Preferences	View whether or not messages sent to you via Message Center are currently set to be automatically forwarded to an external email address (address also displayed). These forwarding preference settings are maintained in My Account. • To change your notification preference, go to the My Account>Email Subscriptions tab. • To change your notification preference, go to the My Account>Personal Information tab.

Permanently Delete Messages

From [the Deleted folder](#), you can click the Empty Trash button to permanently delete all items currently listed there.

 The **Empty Trash** action will include ALL messages in this folder; it is not possible to permanently delete *selected* messages.

Read a Message

When you click on any Subject link in the table on the [Messages](#) tab, whether it is in your Inbox or any other folder, that message opens to a full view.

In addition to the message text and *Subject*, this view displays the names of the sender (*From*) and recipient (*To*). A Date and timestamp indicates when the message was sent. Buttons are provided to **Reply**, **Reply To All**, **Forward** or **Print** the message.

The name(s) of any *Attachment(s)* are listed below the Subject. Each is accompanied by a **View Attachment** button that can be used to open or save that file.

Use the tools in this view to manage your new and read messages.

Move a message to another folder

1. Select a target folder from the **Move to Folder** pull-down menu.
2. Click **Move**. The message moves to the folder you selected.



Organize your messages for easy reference by [maintaining a set of custom folders](#) in the Message Center.

Delete a message you no longer need

1. Click the **Delete This Message** button
2. The message is moved to the *Deleted* folder.

Deleted messages remain accessible until you [Empty Trash](#)

To navigate in this view

- Click the << **Previous Message** and **Next Message** >> buttons to navigate through and read all your messages in this folder.
- Click the << **Back to Mailbox** button to return to the Messages main page.

In the message view, you can use the **Move**, **Delete Message**, **Print**, **Reply**, **Reply All**, or **Forward** buttons as needed.

Compose Messages

The *Compose* tab of the Taskstream [Message Center](#) enables you to create and send messages to other members of your organization. You can send a message to multiple recipients and can optionally include CC: and/or BCC: recipients as well. Messages can include attachments.

To compose a new message

1. From the Message Center, select the *Compose* tab. A blank message form is displayed with your name in the *From* field.
2. Click [the Select Recipients button](#) adjacent to the *To:* field. This opens the Member Locator.

- Locate and select the Taskstream members to whom you want to send this message. You can select as many recipients as needed.
3. (Optional) To send a carbon copy (CC:) and/or a blind carbon copy (BCC:) of this message, click the related Select Recipients button and use the Member Locator to select those individuals.

Reminder: Unlike the names of carbon copy recipients, the names of recipients of blind carbon copies are only seen by the sender of the email. Someone who receives a BCC: will see only his or her own name.

4. Enter a *Subject* for your message.
5. Compose your message in the *Message* text box.
6. (Optional) To verify that no spelling errors exist, click **Check Spelling**.
7. (Optional) Attach files to this message.
 - a. Click **Add Attachments**. The file upload window loads.
 - b. Click the **Browse** button to open a standard browse window.
 - c. Locate and select the file you want to attach.
 - d. Click **Open** to return to the file upload window, which displays the name of your selected *File*
 - e. Click **Add File** to attach. The selected file uploads and you are returned to your message.
 - f. (Optional) Repeat these steps to attach additional files to this same message.
 - g. (Optional) To remove an attachment before sending this message, click the related **Remove** button.

 By default, copies of attachments are stored in your Sent folder together with their messages. To save file storage space, you can opt to NOT keep a copy of the attachment(s). To do this, uncheck the "Copy to Sent Folder" checkbox at the bottom of the message.

8. (Optional) If you are not ready to send your message, click **Save Draft**.

You can access your saved drafts from the Draft folder link of the [Folders](#) tab.

9. Click **Send Message**. A copy of the message is stored in your Sent folder.

Manage Your Folders

Messages are stored in a series of folders, all of which can be accessed from the Message Center's *Folders* tab.

On this tab, the *View/Edit Existing Folders* table lists all your folders by name and provides statistics as to the number of *Messages* and *Unread* messages contained in each, plus the amount of storage space (reported in Kbytes) being used by *Attachments* in each folder.

 Folder Names in this table are links. Use them as shortcuts to navigate to these folders.

When you first start to use the Message Center, four folders are established by default:

Deleted contains all the messages you have deleted from other folders. As long as a message remains in this folder, it can still be viewed and can also be moved back to an active folder.

Sent is your default "outbox", and Drafts contains any saved drafts of unsent messages. [See "Compose Messages" on page 3](#) for details.

Inbox contains new messages. [See "About the Message Center" on page 1](#) for details

Functions of the Folders tab enable you to manage existing folders and also to create new ones.



These functions apply to custom folders only. They do NOT apply to the four default folders.

Create a new folder

1. Enter a title (maximum of 25 characters) in the *New Folder Name* field.
2. Click **Create New Folder**.
3. Your new folder appears in the *View/Edit Existing Folders* table.

The names of custom folders appear in alphabetical order, below the system-generated Sent folder.

Rename a custom folder

1. In the *View/Edit Existing Folders* table, locate the row for the custom folder you want to rename.
2. Click the **Rename** button. The *Rename Folder* dialog window displays.
3. Enter a new title (maximum of 25 characters) for the folder.
4. (Optional) To quit without changing the folder name, click **Cancel**.
5. Click **Apply Changes** to rename the folder. The new name appears in the *View/Edit Existing Folders* table

Archive a custom folder

1. In the *View/Edit Existing Folders* table, locate the row for the custom folder you want to archive.
2. Click the **Archive** button.
3. A prompt appears, asking you to verify your action.
4. (Optional) To quit without archiving this folder, click **Cancel**.
5. Click **OK** to archive the folder. The folder is repositioned within the *Archived Folders* section of the *View/Edit Existing Folders* table.

The (expandable) Archived Folders section is created in the View/Edit Existing Folders table the first time that you archive a folder.



Archived folders do not appear in the 'Go to Folder' (navigation) or 'Move to Folder' (relocate messages) pull-down menus of the Messages tab.

To reactivate an archived folder

1. In the *View/Edit Existing Folders* table, locate the row for the folder you want to archive.
2. Click the **Activate** button.
3. A prompt appears, asking you to verify your action.
4. (Optional) To quit without reactivating this archived folder, click **Cancel**.
5. Click **OK** to reactivate the folder. The folder returns to the main section of the *View/Edit Existing Folders* table. This folder once again appears in the 'Go to Folder' and 'Move to Folder' pull-down menus.

Delete a custom folder

1. In the *View/Edit Existing Folders* table, locate the row for the folder you want to delete.
2. Click the **Delete** button.
3. A prompt appears, asking you to verify your action.
4. (Optional) To quit without deleting this folder, click **Cancel**.
5. Click **OK** to delete the folder. The folder name disappears from the *View/Edit Existing Folders* table.

Message from a "deleted" folder are moved to the Deleted folder. These messages may be accessed in the Deleted folder until you decide [to permanently delete them](#).

Manage Notification Preferences

You can choose whether or not you receive a notification message to an external (not Taskstream) email address each time a new email is sent to you via the Taskstream Message Center. The notification message will include the text of the email.

By default, message notification is enabled.

To manage this setting

1. Go to My Account.
2. Access the *Personal Information* tab.

Each time a message is sent to you through the Taskstream Message area, a notification will be emailed to you at the email address entered as your Personal Contact Information. The notification will include the text of the message.

To not receive external notifications from the Taskstream Message Center

1. Go to *My Account* > *Email Subscriptions*.
2. Select the **Do not forward messages I receive in my Message Center** radio button.
3. (Optional) To quit your action, click **Cancel**.
4. Click **Update** to save this as your preference.

In order to see whether you have any new messages, you must look in [your Message Center Inbox](#).

Select Recipients

When [composing a message](#) in the Message Center, you are asked to identify the message recipient(s). The same process is used for each of the three recipient fields of the *Compose Message* screen.

Decide whether you want to select direct (*To:*), *CC:* or *BCC:* recipients and click the **Select Recipients** button adjacent to that field.

The *Member Locator* displays in a pop-up window. Using the dialog in this window, you can search for members by name, or browse through your community and find individuals by the area(s) with which they are associated.

Basic Search

There are two Basic Search methods available in Member Locator:

To search for Recipients by name

1. In the *Search by Member Name* field, enter all or some of the person's first, last or full name. You must enter at least three characters in order to perform a search.
2. Click **Search**. Matching names are listed in the *Search results* column.
3. To select a member, check the box adjacent to his or her name. The name automatically appears in the *Selected Member(s)* column.
 - (Optional) To check all results, click the **Select** all option.
4. In the *Selected Member(s)* column, review your selections.
 - (Optional) To remove a name from this column, deselect the related checkbox.
5. Click **Save and Close**.

To search for individuals in your Community

1. In the left panel of the *Member Locator*, click on either **Select Categories/Local Areas** or **Select Taskstream Programs**, to reveal related folders.
2. (Optional) Check to *Include inactive (expired) subscribers* in your search results.
3. (Optional) Click **Expand** to show ALL folders in the hierarchy. Alternatively, you can individually expand folders by clicking on them.
 - To reverse this and compress the view of the hierarchy with one stroke, click **Collapse**.

4. Click a folder to reveal members associated with it; their names appear in the *Search results* column.
5. To select a member, check the box adjacent to his or her name. The name automatically appears in the *Selected Member(s)* column. You can select up to twenty (20) people from your organizational area.
 - (Optional) To check all results, click the **Select all** option.
6. In the *Selected Member(s)* column, review your selections.
 - (Optional) To remove a name from this column, deselect the related checkbox.
7. Click **Save and Close**.

Advanced Search

When available, the Advanced Search option enables you to search for members based on demographic information.



The Advanced Search option to Filter by Demographics is only available to Site Coordinators.

To use Advanced Search

1. Click the **Advanced Search** button in the header of the left panel.
 - Note: a **Basic Search** button replaces it in the renamed panel header.
2. Select **Filter by Demographics**
3. The section expands to display a list of folders, each representing a category of demographic information requested by your organization. Click on a demographic descriptor to view the values associated with that information.

Demographic information is obtained through a data collection process when the subscriber initially logs in to Taskstream OR when the Taskstream administrator requests it. A subscriber can also update their demographic information through the Personal Information area of "My Account."

4. Click each value by which you want to search.
5. Click the **Search** button. The names of members who match those criteria appear in the Search results column.
 - To reset your criteria and begin again, click **Clear**
6. To select a member, check the box adjacent to his or her name. The name automatically appears in the *Selected Member(s)* column. You can select up to twenty (20) people from your organizational area.
 - (Optional) To check all results, click the Select all option.
7. In the *Selected Member(s)* column, review your selections.
 - (Optional) To remove a name from this column, deselect the related checkbox.
8. Click **Save and Close**.