NewOrg Messaging Center

The Message Center allows staff to communicate securely regarding protected client data. It is HIPAA compliant, auditable, and allows searching.

• Staff can directly message with another colleague or create custom channels including multiple staff members.

• Can share contact, event, form/surveys and print forms with other staff in an easy, quick way. This will speed up administrative or operational tasks as compared to sending an email or using another communicative tool.

Contents

Where can you access the NewOrg Messaging Center

- 1) When you are in one the main tabs that run along to the top of the NewOrg screens...
  2) You will see a speech bubble at the top right of the screen.

- You will also see the speech bubble at the top of all events.

Creating specific user channel/s for ALL users, so you can all communicate together

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the "+" icon to the right of the "Channels" header on the top left of the screen.

- 1) Select the "New Channel Name".
  2) Enter what the channel is meant to be used for in the "Description" text box.
  3) Select "Public" from the "Type" dropdown.

- Click the "Save" button to create the channel.

Creating a user channel that is only visual to specific users, so a specific group can communicate without all other users seeing it

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the "+" icon to the right of the "Channels" header on the top left of the screen.

- 1) Select the "New Channel Name".
  2) Enter what the channel is meant to be used for in the "Description" text box.
  3) Select "Private" from the "Type" dropdown.

- Click the "Save" button to create the channel.

- Click the "Add Member" button.

- 1) Select the staff user from the "Select Member to Add" dropdown.
  2) Click the "Add Member" button below the dropdown.
  3) Click the "Close" button at the top of the event.

Creating a specific user channel for a select group of users, but allows other users to request to join

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the "+" icon to the right of the "Channels" header on the top left of the screen.

- 1) Select the "New Channel Name".
  2) Enter what the channel is meant to be used for in the "Description" text box.
  3) Select "By Request" from the "Type" dropdown.

- Click the "Save" button to create the channel.

Requesting access to a channel

- Click the speech bubble icon on the top right of the NewOrg screen

- 1) when you see a lightly greyed out channel it means you are not approved to join it but you can request to join. Click the gear icon on the channel row.
  2) Click "Request Access" button on pop-up window.

Approving/Denying users who have requested or are responding to you newly created event

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the gear icon on the right on the newly made channel you made.

- 1) Click the "Approve" or "Deny" button on the user who wishes to join the channel or are responding to your original invite.
  2) Click the "Close" button at the top of the screen.

Removing yourself or another user from a channel

- Click the speech bubble icon on the top right of the NewOrg screen

- Click the gear icon on the right on the newly made channel you made.

Edit Channel

		Close
Channel Name	General	
Description	For all staff to message organizational related messages.	
Status	Active	
Access	By Request	
Created By	Nick Rowan on 5/22/2020	

Save

Requests to Join Channel

Member Name	Dept/Loc/Type	Date Requested		
David Crouch	Administration Washington, DC Staff	5/22/2020	✔ Approve	✖ Deny

Channel Members

+ Add Member

Member Name	Date Added	Added By	
Nick Rowan	5/22/2020	Nick Rowan	✖ Delete
Jared Ferguson	5/22/2020	Jared Ferguson	✖ Delete

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2

- 1) Click the "Delete" button on the far right your user name or another user depending who you want removed from the channel.
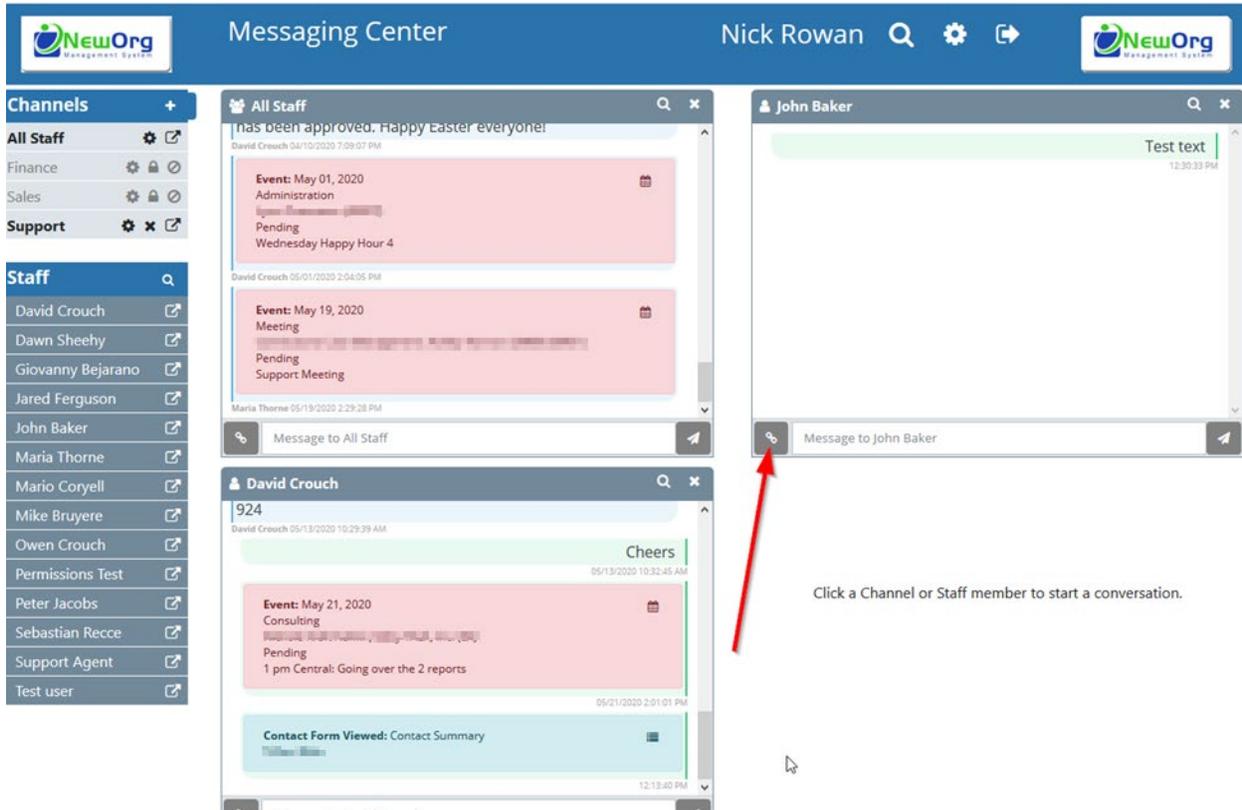 2) Click the "Close" button at the top of the event.

How to send a message/s to an individual or group channel from a NewOrg tab

- Click the speech bubble icon on the top right of the NewOrg screen

- 1) If wishing to send to a specific group of user, click one of the channel menu options on the top left of the screen. If you wish to message an individual skip to step 2 of this screenshot and skip to step 3. If wishing to message an individual user, go to step 2 of this screenshot.
  2) If wishing to message a single staff user, click their name on the left hand menu.
  3) A message tile will appear on the screen with either the channel name or staff name at the top of it. If messaging just a text message, enter it into the message text field and then click the paper airplane icon to send it.

- To message a channel or staff member a recent activity item of yours, for example, a contact, event, form/survey or print form, click the link icon on the bottom left of the message tile.

- A "Recent Activity" window will pop-up. Just click the contact, event, form/survey or print form item you wish to share.

- To message a channel or staff member a recent activity item of yours, for example, a contact, event, form/survey or print form, click the link icon on the bottom left of the message tile.
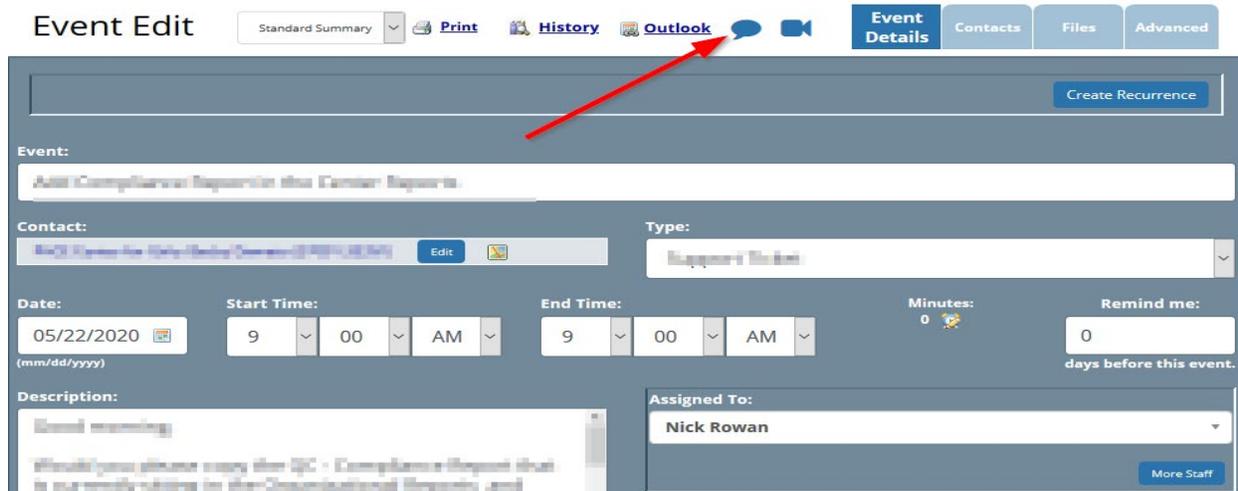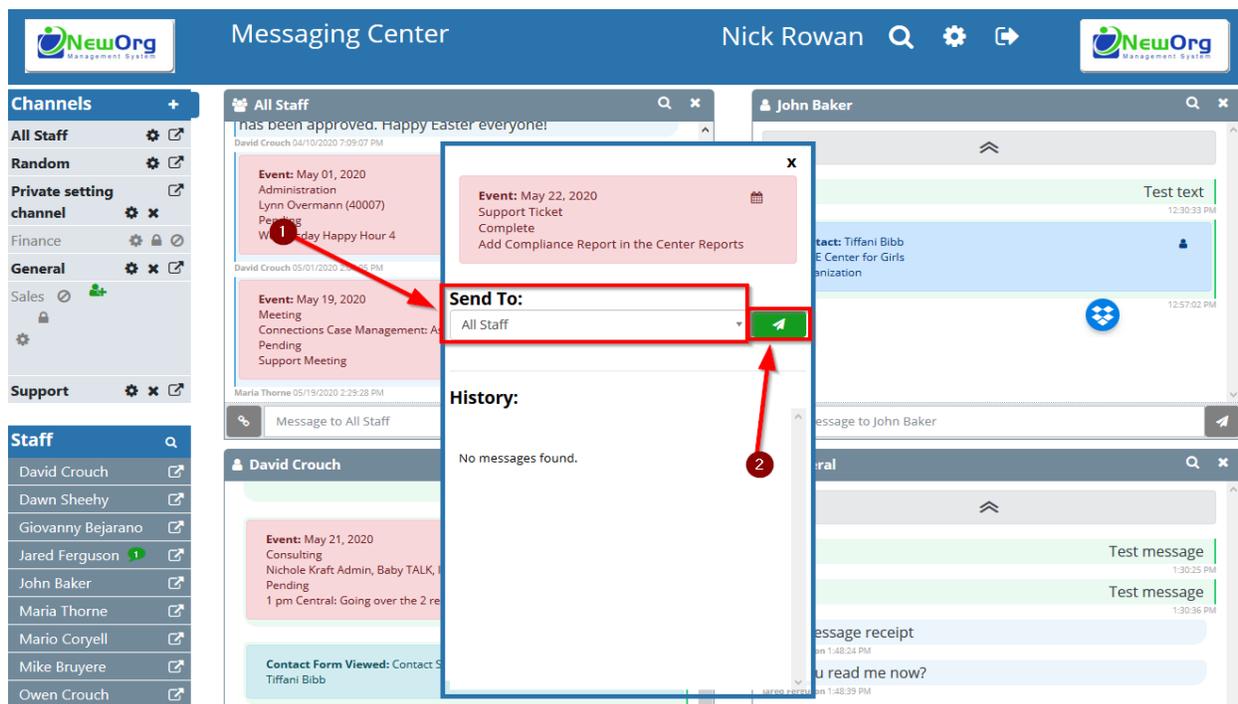
Sending event information to a user or channel from an event, for example, for review or to give them event link so they can join a video conference

- Click the speech bubble icon on the top right of event screen you are on.

- 1) Choose the channel or user you wish to send the event link to.
  2) Click the paper plane icon to send it to the channel or user.

How to know when you have a message to review, be it sent to you directly or to a channel

- When you see a number in the speech bubble icon on the top right of the screen it means there is a message to review, be it sent to you directly or to a channel. The number signifies the number of messages to review. Click the speech bubble.

- You will see a green speech bubble to indicate where the new message is for you to review. The number representing the number of messages to review within that channel or direct message. Click the channel or staff direct message menu item.

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- Read the message sent to you. Click into the message text field of the message tile to remove the review notification and reply.

Setting up frequency of email or SMS (not yet live yet) notifications of new messages to review

- Click the speech bubble icon on the top right of the NewOrg screen

- 1) Click the gear icon at the top right of the screen.
  2) Choose the frequency of the alerts from the "Send Alerts" dropdown.
  3) Select alert method within the "Send To" dropdown. SMS is not yet live.
  4) Click the "Save" button.

Searching across all your messages for specific information

- Click the speech bubble icon on the top right of the NewOrg screen.

- 1) Click the magnifying glass icon at the top of screen.
  2) Enter search items into the text field indicated. When searching you can use operators to refine your search. The following characters can be used - for NOT, & for AND, space for OR, and "some text" for multi-word phrases.

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