



Messaging Guide for Administrators

This guide shows you how to:

- *Create and send messages*
- *Check the status of sent messages*
- *Select message recipients from specific search criteria*
- *Formatting a message with links and attachments*
- *Select different delivery options*
- *View message reports*
- *View message information for a particular user*

Creating and Sending Messages:

1. Log in to the internal side of the Doculivery system with your unique user name and password.
2. Once logged in, click the Archive Research tab.
3. Do a search based on the employees or users that you would like to message.

Your search results will be your list of those who you wish to send message.

Archive Research | Transmission Log | Upload File | InfoForm Downloads | Preferences | Manage Internal Users | Manage External Users

Account Number: any value
Statement Date: on 7/24/2006
SORT RESULTS BY: Account Number Ascending
SEARCH CLEAR SEARCH

Creating a Message List of All Employees From Your Last Pay Run:

1. Once you have clicked on the Archive Research tab, simply press the Search button to create a search results list of all employees from your last pay run.

You'll notice that the last statement date was already selected for you before you clicked the Search button.

Archive Research | Transmission Log | Upload File | InfoForm Downloads | Preferences | Manage Internal Users | Manage External Users

Account Number: any value
Statement Date: on 7/24/2006
SORT RESULTS BY: Account Number Ascending
SEARCH CLEAR SEARCH

Creating a Message List of All Employees Who Have Ever Received a Pay Stub:

1. Once you have clicked on the Archive Research tab, select Any Value from the drop-down menu in the Statement Date row.
2. Click the Search button to create a search results list of all employees who have ever received an online pay stub.

Even though your employees may be listed several times in the search results, they will only be sent a message once.

Archive Research | Transmission Log | Upload File | InfoForm Downloads | Preferences | Manage Internal Users | Manage External Users

Account Number: any value
Statement Date: any value
SORT RESULTS BY: Account Number Ascending
SEARCH CLEAR SEARCH

Selecting Message Recipient(s) from your Search Results List:

- Once you have created your search results list, notice the gray gears on the right side of the list grid.

You are able to send a message to the entire list by clicking on the multiple-gear icon in the top right corner. You may also send a message to an individual result in the list by clicking the single-gear icon next to the appropriate list item.

Your search resulted in **16** matches. [Download results as a spreadsheet.](#)

	ACCOUNT NUMBER	STATEMENT DATE	
	333334	7/24/2006	
	333336	7/24/2006	
	333338	7/24/2006	
	333339	7/24/2006	
	333340	7/24/2006	
	333341	7/24/2006	
	333342	7/24/2006	
	333343	7/24/2006	
	333344	7/24/2006	
	333345	7/24/2006	

- After you have clicked on the appropriate gear(s) icon, a pop-up window will appear next to it. Click inside the pop-up window where it says "Send message...." to continue on to the message creation screen.

[Download results as a spreadsheet.](#)

STATEMENT DATE	
7/24/2006	
7/24/2006	
7/24/2006	
7/24/2006	
7/24/2006	
7/24/2006	
7/24/2006	
7/24/2006	
7/24/2006	
7/24/2006	

Send message to all users matching the results

Creating your Custom Message:

On this screen you are able to create your message in the same way you create a regular email message or a document in a word processing program.

You have control over message title, font style, color, size, and paragraph formatting. You even have the ability to embed website links, and attach up to three files to your message.

There are also three message delivery options available:

- Must Certify
- Must Read
- No Acknowledgement Required

This message will be sent to 16 account(s).

Message Title: _____

Message Text: _____

Must Certify Message - user must check box that they have read this message
 Must Read Message - user will be directed to this screen immediately upon login
 No Acknowledgement Required

You may attach up to three files to this message.

Description: _____
 Description: _____
 Description: _____

Viewing the Number of Recipients:

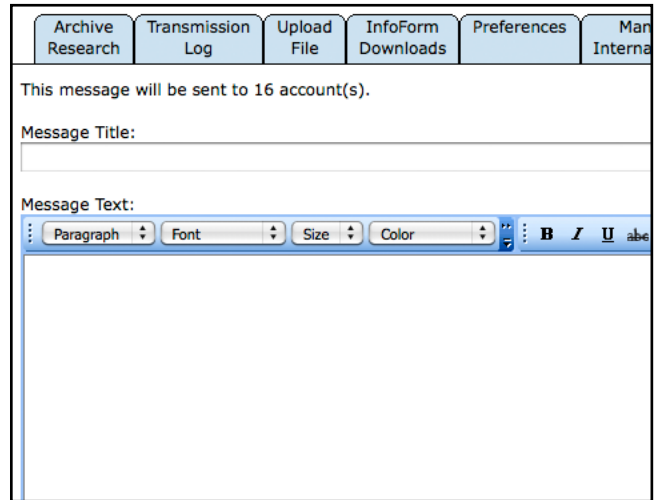
Above the Message Title field, you are able to see the total number of recipients who will get this message.

Creating the Message Title:

1. Type the title of your message into the Message Title field.

Creating the Message Text:

1. Type your entire message into the Message Text field, and format the text to your liking.



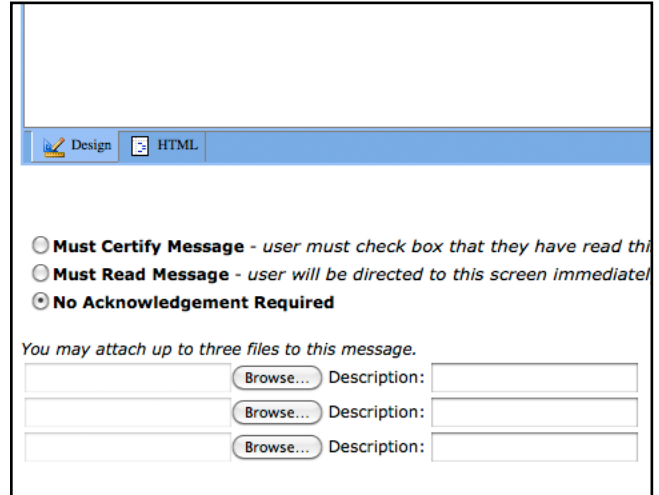
The screenshot shows a top navigation bar with buttons for 'Archive Research', 'Transmission Log', 'Upload File', 'InfoForm Downloads', 'Preferences', and 'Man Intern'. Below this, a message status line reads 'This message will be sent to 16 account(s)'. There is a 'Message Title:' field with a text input box. Below that is a 'Message Text:' field with a rich text editor toolbar containing options for Paragraph, Font, Size, Color, Bold (B), Italic (I), Underline (U), and a text color picker (abe).

Selecting a Message Delivery Option:

1. Select one of the three message delivery options based on your needs.

Selecting the Must Certify or Must Read option will display the message to the user before they are granted access to their account.

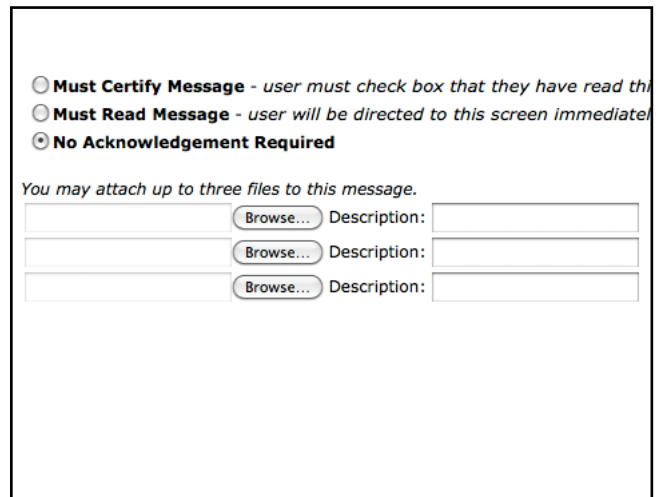
Selecting the No Acknowledgement Required option will alert the user that they have a new message to read, but does not force them to read it before being granted access to their account.



The screenshot shows a 'Design' and 'HTML' tab bar. Below it are three radio button options: 'Must Certify Message - user must check box that they have read this message', 'Must Read Message - user will be directed to this screen immediately', and 'No Acknowledgement Required' (which is selected). Below these options is the text 'You may attach up to three files to this message.' followed by three rows, each with a 'Browse...' button and a 'Description:' text input field.

Adding Document Attachments to a Message:

1. Click the Browse button to select a file on your computer that you wish to attach to this message.
2. A file upload screen will appear. Navigate to the appropriate file wherever it may reside on your computer or network, and click the Open button.
3. Type a file description into the corresponding Description field.
4. Repeat step one through three up to two more times to attach a maximum of three documents to your message.



This screenshot is identical to the one above, showing the 'No Acknowledgement Required' option selected and three 'Browse...' buttons with 'Description:' fields for attachments.

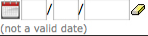
Setting a Message Expiration Date:

Doculivery allows you to set an expiration date for your message.

If your message is time specific, for instance if your message is announcing a company picnic, you may not want to display that message after the picnic.

1. Click on the Calendar icon next to "When should this message expire?" and select the appropriate expiration date.

If you choose not to set an expiration date for your message, your message will remain available until deleted.

When should this message expire? (Leave blank for "never")  (not a valid date)

Automatically deliver this message to new users?

June 2010						
SUN	MON	TUE	WED	THU	FRI	SAT
MAY 30	MAY 31	JUN 1	JUN 2	JUN 3	JUN 4	JUN 5
JUN 6	JUN 7	JUN 8	JUN 9	JUN 10	JUN 11	JUN 12
JUN 13	JUN 14	JUN 15	JUN 16	JUN 17	JUN 18	JUN 19
JUN 20	JUN 21	JUN 22	JUN 23	JUN 24	JUN 25	JUN 26
JUN 27	JUN 28	JUN 29	JUN 30	JUL 1	JUL 2	JUL 3
JUL 4	JUL 5	JUL 6	JUL 7	JUL 8	JUL 9	JUL 10

Automatic Delivery of a Message:

Doculivery allows you to create a message that will be delivered to a new user when a new user account is setup in the Doculivery system.

For example, if you wanted new employees to opt-in for online W-2 access, you could create a W-2 opt-in message encouraging them to do so, and have them acknowledge that they have read it when they log into the Doculivery system for the first time.

1. To setup a message for automatic delivery, select the checkbox next to "Automatically deliver this message to new users?"

Must Certify Message - user must check box that they have read this message

Must Read Message - user will be directed to this screen immediately upon login

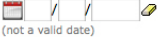
No Acknowledgement Required

You may attach up to three files to this message.

Description:

Description:

Description:

When should this message expire? (Leave blank for "never")  (not a valid date)

Automatically deliver this message to new users?


Sending the Completed Message:

1. Once you have configured your message appropriately, Click the Send Message button.

You will then see a popup message stating:

The message will be sent to the specified users. If a large number of users where targeted, this process may take a few minutes to complete. The status can be viewed on the "Jobs" tab.

2. Click the OK button to dismiss the popup message.

 The page at <https://www.natpaydemos.com> says:

The message will be sent to the specified users. If a large number of users were targeted, this process may take several minutes to complete. The status can be viewed on the "Jobs" tab.

Seeing the Status of a Sent Message:

1. Click the Jobs tab to see a list of recent activities that have taken place.

You will see the status of the message you sent towards the top of the list.

Archive Research	Transmission Log	Upload File	InfoForm Downloads	Preferences	Manage Internal Users	Manage External Users	Payment Report	Department Management	Doculivery User Reports	Message Reports	Edit Landing Page Text	Jobs
Jobs that are more than two weeks old may be deleted automatically. Please be sure to download and save locally any results you would like to keep.												
			JOB SUBMITTED DATE	JOB DESCRIPTION							JOB STATUS	
Download	Delete		6/25/2010 @ 4:20 PM	Send message to multiple users							The job is complete.	
Download	Delete		6/25/2010 @ 12:33 PM	Send message to multiple users							The job is complete.	
Download	Delete		6/24/2010 @ 3:15 PM	Send message to multiple users							The job is complete.	
Download	Delete		6/18/2010 @ 11:47 AM	Send message to multiple users							The job is complete.	
Download	Delete		6/18/2010 @ 10:29 AM	Send message to multiple users							The job is complete.	
Download	Delete		6/16/2010 @ 11:36 AM	Send message to multiple users							The job is complete.	
Download	Delete		6/15/2010 @ 1:19 PM	Send message to multiple users							The job is complete.	
Download	Delete		6/10/2010 @ 3:25 PM	Send message to multiple users							The job is complete.	
Download	Delete		6/10/2010 @ 11:41 AM	Send message to multiple users							The job is complete.	
Download	Delete		6/10/2010 @ 11:38 AM	Send message to multiple users							The job is complete.	
Download	Delete		6/10/2010 @ 11:30 AM	Send message to multiple users							The job is complete.	
Download	Delete		6/10/2010 @ 11:16 AM	Send message to multiple users							The job is complete.	
Download	Delete		6/10/2010 @ 11:09 AM	Send message to multiple users							The job is complete.	
Download	Delete		5/25/2010 @ 12:25 PM	Send message to multiple users							The job is complete.	
Download	Delete		5/21/2010 @ 9:52 AM	Send message to multiple users							The job is complete.	
Download	Delete		5/18/2010 @ 2:16 PM	Send message to multiple users							The job is complete.	
Download	Delete		5/10/2010 @ 9:35 AM	Send message to multiple users							The job is complete.	
Download	Delete		4/29/2010 @ 3:36 PM	Downloaded search results							The job is complete.	
Download	Delete		4/29/2010 @ 9:21 AM	Send message to multiple users							The job is complete.	
Download	Delete		4/22/2010 @ 8:22 AM	Send message to multiple users							The job is complete.	
Download	Delete		4/19/2010 @ 2:24 PM	Send message to multiple users							The job is complete.	
Download	Delete		4/14/2010 @ 11:46 AM	Send message to multiple users							The job is complete.	
Download	Delete		4/14/2010 @ 10:44 AM	Send message to multiple users							The job is complete.	
Download	Delete		4/13/2010 @ 3:55 PM	Send message to multiple users							The job is complete.	
Download	Delete		4/13/2010 @ 9:15 AM	Send message to multiple users							The job is complete.	

Message Reports Tab:

1. Click the Message Reports tab to see who has read a message, to view past messages, or to manually delete messages.

Archive Research	Transmission Log	Upload File	InfoForm Downloads	Preferences	Manage Internal Users	Manage External Users	Payment Report	Department Management	Doculivery User Reports	Message Reports
Jump to page (1 of 3) Next Page										
Report	View	Delete	TIME CREATED	TITLE						AUTHOR
Report	View	Delete	6/25/2010 @ 4:20 PM	Test						Test User
Report	View	Delete	6/25/2010 @ 12:33 PM	Great Benefits						Test User
Report	View	Delete	6/24/2010 @ 3:15 PM	The Children's Place						Test User
Report	View	Delete	6/22/2010 @ 4:45 PM	Parking						Test User
Report	View	Delete	6/21/2010 @ 2:37 PM	Good Afternoon						Test User
Report	View	Delete	6/18/2010 @ 10:29 AM	Complete All Forms Today						Test User
Report	View	Delete	6/16/2010 @ 11:36 AM	Test						Test User
Report	View	Delete	6/15/2010 @ 1:19 PM	test						Test User
Report	View	Delete	6/10/2010 @ 3:25 PM	test						Test User
Report	View	Delete	6/10/2010 @ 11:41 AM	HUNT ELECTRIC'S SAFETY CULTURE						Test User
Report	View	Delete	6/10/2010 @ 11:38 AM	Hunt Electric Company Newsletter April 2010						Test User
Report	View	Delete	6/10/2010 @ 11:30 AM	Company Newsletter Volume II						Test User
Report	View	Delete	6/10/2010 @ 11:16 AM	Company Newsletter						Test User
Report	View	Delete	6/10/2010 @ 11:09 AM	Welcome new employee!						Test User
Report	View	Delete	6/4/2010 @ 8:41 AM	Good Morning						Test User
Report	View	Delete	5/27/2010 @ 4:00 PM	test						Test User
Report	View	Delete	5/27/2010 @ 1:36 PM	June 30th deadline to sign Code of Ethical Conduct Agreement						Test User
Report	View	Delete	5/26/2010 @ 3:05 PM	Good Afternoon						Test User
Report	View	Delete	5/25/2010 @ 12:25 PM	Test						Test User
Report	View	Delete	5/21/2010 @ 9:52 AM	From Tom Fehsenfeld						Test User
Report	View	Delete	5/20/2010 @ 4:04 PM	test						Test User
Report	View	Delete	5/18/2010 @ 2:16 PM	Talk to Us						Test User
Report	View	Delete	5/12/2010 @ 2:56 PM	Good Afternoon						Test User
Report	View	Delete	5/11/2010 @ 11:05 AM	test						Test User

Seeing Who Has Read a Message:

1. On the Message Reports screen, click the Report link next to the applicable message to see who has read the message or not.

Viewing a Sent Message:

1. Click the Show Message link at the top left of the Report screen when viewing a report for a particular message.

You may also click the View link next to a particular message while on the main Message Reports screen, as shown in the previous screen shot. This allows you to see the message as the users see it.

Show Message

Show only recipients who have certified the message
 Show only recipients who have read the message

Show only recipients who have not certified the message
 Show only recipients who have not read the message

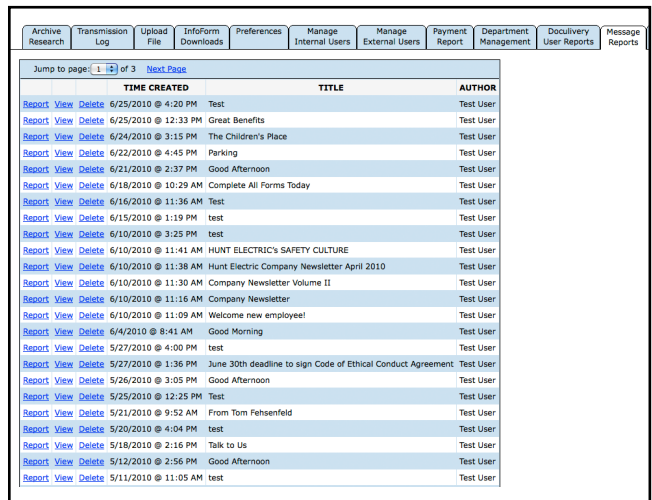
Show both
 Show both

16 recipient(s) match these criteria.

ACCOUNT NUMBER	ACCOUNT NAME	TIME READ	TIME CERTIFIED
333334	JOHN ADAMS		
333336	JAMES MADISON		
333338	ANDREW JOHNSON		
333339	MARTIN VANBURN		
333340	WILLIAM HARRISON		
333341	JOHN TYLER		
333342	JAMES POLK		
333343	ZACHARY TAYLOR		
333344	MILLORD FILLMORE		
333345	FRANKLIN PIERCE		
333346	ULYSSES GRANT		
333347	JAMES BUCHANAN		
333348	ABRAHAM LINCOLN		
333349	RUTHERFORD HAYES		
333350	ANDREW JACKSON		
LITWARE0001	DEMO ACCOUNT		

Deleting a Message:

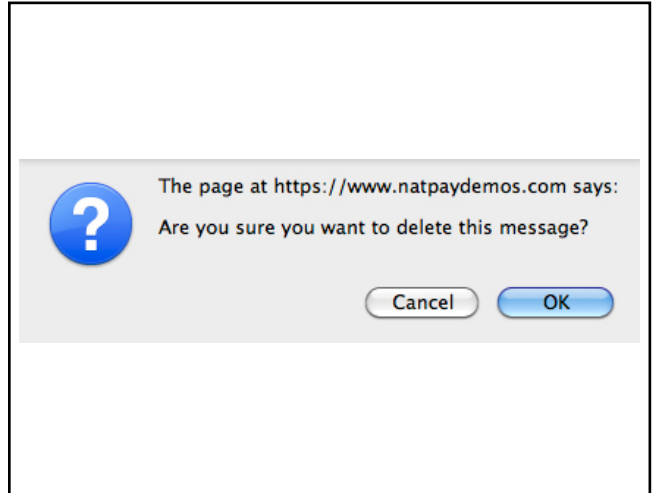
1. While viewing the main screen of the Message Reports tab, click the Delete link next to the message you wish to delete.



The screenshot shows a web application interface with a navigation menu at the top containing: Archive Research, Transmission Log, Upload File, InfoForm Downloads, Preferences, Manage Internal Users, Manage External Users, Payment Report, Department Management, Doculivry User Reports, and Message Reports. Below the menu, there is a table with columns for 'TIME CREATED', 'TITLE', and 'AUTHOR'. Each row represents a message and includes a 'Delete' link. The messages listed include 'Test', 'Great Benefits', 'The Children's Place', 'Parking', 'Good Afternoon', 'Complete All Forms Today', and various newsletters and announcements.

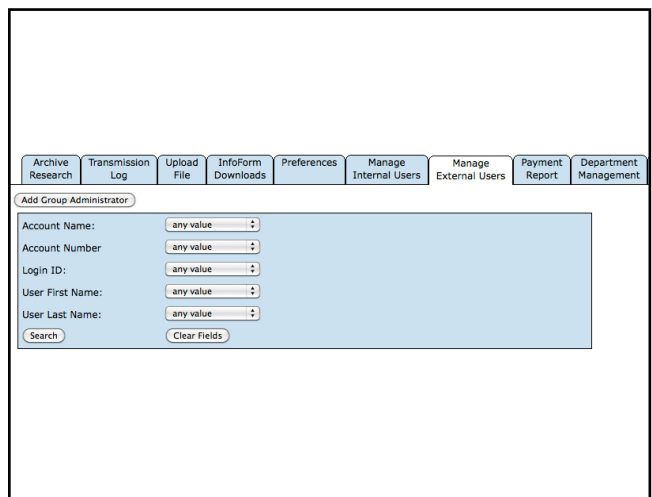
2. A popup message will appear to confirm that you would like to delete the message. Click the OK button to confirm and finish deleting the message.

Once you have deleted a message, Doculivry users will not see the message on the system any longer.



Viewing Messages Sent To a Particular User:

1. Click the Manage External Users tab.
2. Set your search criteria for a particular user.
3. Click the Search button.



The screenshot shows the 'Manage External Users' section of the application. It features a search form with the following fields: Account Name, Account Number, Login ID, User First Name, and User Last Name. Each field has a dropdown arrow. Below the fields are 'Search' and 'Clear Fields' buttons. The navigation menu at the top includes: Archive Research, Transmission Log, Upload File, InfoForm Downloads, Preferences, Manage Internal Users, Manage External Users, Payment Report, and Department Management.

- In the search results grid, click the Select User link next to the appropriate user.

Add Group Administrator

Account Name:

Account Number:

Login ID:

User First Name:

User Last Name:

Jump to page: 1 of 49 [Next Page](#)

		ACCOUNT NAME	LOGIN ID	FIRST NAME	LAST NAME	ACCOUNT NUMBER
Select User	Select Account	VALDOR ENTERPRISES	000092040		ENTERPRISES	000092040
Select User	Select Account	VALDOR ENTERPRISES	dm=001	Dm	Dm	000092040
Select User	Select Account	A FRANK TOMBRAGEL	018562770	A	TOMBRAGEL	018562770
Select User	Select Account	A JEAN BROWN	000094790	A	BROWN	000094790
Select User	Select Account	A VALLENE ELKINS	008769790	A	ELKINS	008769790
Select User	Select Account	AARON C HERRING	000091660	AARON	HERRING	000091660
Select User	Select Account	ABRAHAM LINCOLN	333348	ABRAHAM	LINCOLN	333348
Select User	Select Account	ADAM BARNETT	000055290	ADAM	BARNETT	000055290
Select User	Select Account	ADAM HALL	000085320	ADAM	HALL	000085320
Select User	Select Account	ADAM HALL	dan2	dan	dan	000085320
Select User	Select Account	ADDIE CONWAY	008129820	ADDIE	CONWAY	008129820
Select User	Select Account	ADRIANNE GILL	000090630	ADRIANNE	GILL	000090630
Select User	Select Account	Advanced Bicycles	ADVANCED0001	Advanced Bicycles	Advanced Bicycles	ADVANCED0001
Select User	Select Account	AGUSTIN BEAR	018239620	AGUSTIN	BEAR	018239620
Select User	Select Account	AGUSTIN BEAR	dude	dude	dude	018239620
Select User	Select Account	AIMEE B VEID	018311300	AIMEE	VEID	018311300

- In the User Maintenance screen, Click the "Show this user's messages" link.

First Name:

Last Name:

Email:

Login ID:

[\(Change Password\)](#)

Force user to change password on next login?

Is this user the primary user on the account?

[Manage this user's department admin rights](#)

[Manage Account #000092040](#)

[Show this user's messages](#)

[Show this user's notification options](#)

Clicking the "Show this user's messages" link will show a detailed view of the messages sent to this particular user, and whether or not the messages have been read.

[Hide this user's messages](#)

Jump to page: 1 of 2 [Next Page](#)

Message	Read	Date Created
Great Benefits		6/25/2010
The Children's Place		6/24/2010
Complete All Forms Today		6/18/2010
Test		6/16/2010
test		6/15/2010
test		6/10/2010
HUNT ELECTRIC'S SAFETY CULTURE		6/10/2010
Hunt Electric Company Newsletter April 2010		6/10/2010
Company Newsletter Volume II		6/10/2010
Company Newsletter		6/10/2010
Welcome new employee!		6/10/2010
Test	<input checked="" type="checkbox"/>	5/25/2010
From Tom Fehsenfeld	<input checked="" type="checkbox"/>	5/21/2010
Talk to Us	<input checked="" type="checkbox"/>	5/18/2010
Safety Comes First	<input checked="" type="checkbox"/>	5/10/2010
The Right Way to Do Things	<input checked="" type="checkbox"/>	4/29/2010
Quality of Your Health Care	<input checked="" type="checkbox"/>	4/22/2010
Save on Your Next Energy Bill	<input checked="" type="checkbox"/>	4/19/2010
Sell Something	<input checked="" type="checkbox"/>	4/14/2010
Test	<input checked="" type="checkbox"/>	4/14/2010

Jump to page: 1 of 2 [Next Page](#)

[Show this user's notification options](#)

