

Using Communicate – Send Email to email in Integris

For the Integris Administrator

Communicate – Send Email can be used to **send emails** to pupil are not secure contacts within Integris allowing for attachments.

However, please note that emails through Communicate therefore schools should be mindful not to include information either in the body of the email or in attachments.

All emails sent via **Communicate – Send Email** will be available to contacts in the **Parent Portal**.

The **Communicate – Create Letter** function can also be used for **merging documents** (templates) with information from Integris (as letters, certificates etc.) for individual pupils or groups of children (see [LiteBite 14A – Using Communicate to mailmerge](#)). Documents merged through Communicate can also be automatically stored in a pupil's **Docs & Comms** section of their record (which can be viewed by other users) and which can then transfer over into **Parent Portal**.

These instructions cover:

Stage 1 – Check presence and accuracy of contact email addresses

Stage 2 - Preparation of documents to include as attachments in the email

Stage 3 – Send the email through Communicate

*****Selecting a group of pupils for Send Email

Stage 1 – Check presence and accuracy of contact email addresses

You need to **check email addresses recorded for your contacts** by running either of the following reports. Note: you only need to have one contact email address for the pupil (either PG1 or PG2).

1.1 To obtain a printable list on contact email addresses and phone numbers from a **report**:

Go to **Reports > Ad-Hoc Reporting – Simple > LA Reports > Contact email addresses and phone numbers (Print)** > click on the + to access the *Search* screen > click **Find** (*note: you can change the Roll Status to Admissions if required*) > click **Select** and click **Yes** to the prompt to select all pupil records and list them for the report > click **Generate Report** > you should see a report ready for printing (or for extracting into Word or Excel using the icon buttons at the top of the report)

OR

To obtain a list of pupil and contact email addresses and phone numbers in a **spreadsheet**:

Go to **Reports > Ad-Hoc Reporting –Simple > LA Reports > Contact email addresses and phone numbers (Export)** > click on the + to access the *Search* screen > click **Find** > click **Select** and click **Yes** to the prompt to select all pupil records and list them for the report > click **Generate Report** > you will be asked to open or save a spreadsheet extract of the pupil names, contact details, email addresses and phone numbers.

1.2 Go through the details, identifying where email addresses are missing and phoning parents/carers where possible for their email address.

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Stage 2 - Preparation of documents to include as attachments in the email

2.1 If you are intending to send out any attachments, ensure the documentation is prepared first. Otherwise go straight to Stage 3 – Send Email

For example, attachments could be:

New Pupil Form

Has your New Pupil Form been updated to reflect any changes in GDPR considerations for consent depending on new systems to be introduced or changes in practice in the school?

If you are using CBICT's template for the **New Pupil Form**, pay particular attention to **Section 4: Additional Information** (requiring parental consent) – does this need to be changed/additional areas for consent to be added?

(The original CBICT's template for the New Pupil form is available from Year End web page)

Privacy Notice (Pupil information)

When the New Pupil Form is issued to new parents/carers for completion, it should be accompanied by the school's **Privacy Notice** explaining how the school deals with personal information. Has your school's Privacy Notice been checked to ensure that it is up-to-date to reflect any changes in systems used and practice regarding the handling and sharing of data.

Additional documents/forms

You can of course attach any number of documents you usually send out to new parents/contacts. Ensure that each of them have been updated ready for the new/current academic year.

Format of forms (save as PDF)

Unless your school has a secure method for parents/carers to send back completed forms in Word format (this does not include attaching forms by return email to the school!), the recommended method is that your forms are converted to PDF format and attached as such. Parents/carers can be requested to complete the pdf forms manually and return them to the school by post. Think about how you want the New Pupil Form and other forms requiring information to be completed and returned.

Alternatively, you can create your form on Google Forms using your school's Google Drive to save and collect information through the online forms.

To save a document as a PDF, open the document in Word (as part of Office 365 suite), then select **File > Save As >** from the **File Format** menu, select **PDF** (under *Export Format*) and **Save** to your required location.

Before you email any documents out, please check them for accuracy and typos etc.

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Stage 3 – Send the email through Communicate

Please note the following before you start using Communicate for emailing:

- All emails generated through Communicate will be from a pseudo email address called 'schoolmail@rmintegris.com' which appears in the recipients' inbox.
- If your parents/carers respond to this email by simply using **Reply**, they will automatically see the response email address as that which appears in the email address entry within **School Details** – check that the email address entered in **Modules > General > School Details > Email Address** is a generic school email address which your parents can use.
You can if you wish ask your parents/carers to respond to another email address for the school – you have the option to include an alternative email address when you compose your message.

Recommend: test out Communicate – Send Email by creating a test pupil record in Admissions roll with your own email address to see how the email appears when received!

To send an email to one pupil's contact(s), you can either:

1. Go directly to a pupil record in **Modules > General > Student Details** > select the required pupil record (by typing in the child's surname or part of surname into the **Quick Search** field and click on **Search** icon) >
> when the record is selected, click on **Send Email** link at the top right of the record

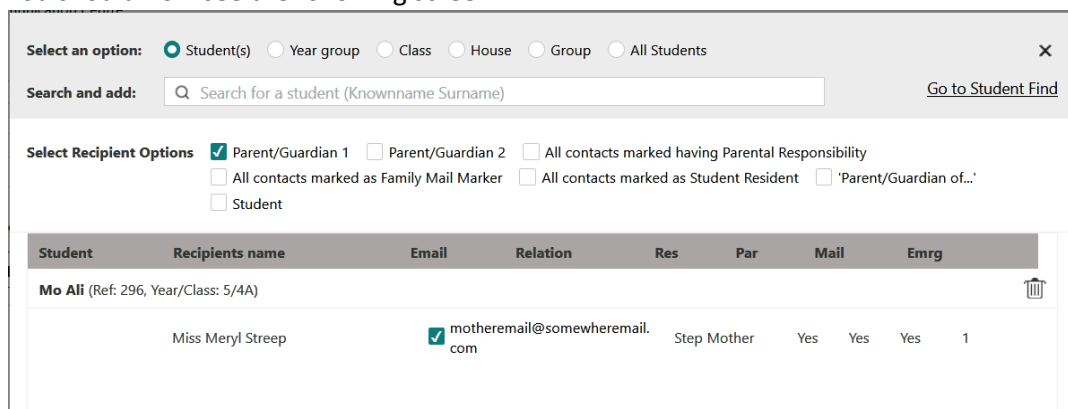
If you want to send an email for several or a group of pupils, go to ***** on page 6

OR

Go to **Modules > Communicate > Communicate Centre > Send Email**
> click on the **TO** button
> click on **Go to Student Find** > select the required pupil record

If you want to create a merged letter for a group of pupils, go to ***** on page 6

You should now see the following screen:



Select an option: ☒ Student(s) ☐ Year group ☐ Class ☐ House ☐ Group ☐ All Students

Search and add: [Go to Student Find](#)

Select Recipient Options ☒ Parent/Guardian 1 ☐ Parent/Guardian 2 ☐ All contacts marked having Parental Responsibility
☐ All contacts marked as Family Mail Marker ☐ All contacts marked as Student Resident ☐ 'Parent/Guardian of...'
☐ Student

Student	Recipients name	Email	Relation	Res	Par	Mail	Emrg
Mo Ali (Ref: 296, Year/Class: 5/4A)	Miss Meryl Streep	<input checked="" type="checkbox"/> motheremail@somewheremail.com	Step Mother	Yes	Yes	Yes	1

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Important note: the default recipient option will be set to PG1 and the recipient name relating to PG1 will appear in the record under the pupil's name.

- If you have set up **Family Mail** indicator (to denote contact or contacts identified for communication as per [LiteBite 23 – Using Family Mail marker](#)), then please remove PG1 and select '**All contacts marked as Family Mail Marker**'. This will add any additional contacts to the list (in cases of split parents) and will then send a separate email to each contact marked as Family Mail (providing an email address is provided in the contact record). *See Notes on choice of recipient on page 5*
- Click **Add Selection** to move to the next step

Send Email

To	Miss Meryl Streep x
From name	Mr PC Catman
Reply to address	
Subject line	
Attach files	
Dear <Salutation>	

You will see that the contact name appears in the **To** box and your user name appears in the **From name** box.

- The **Reply to address** box is empty – only enter in an email address if you want a reply directed to a different email address other than your user email address (as it appears in the **From name** box)
You may want the response to be directed to a generic school email address as defined in Modules > General > School Details - otherwise leave this box blank
- In the **Subject line** box, enter a reference to the subject/reason for the email
- Message:** In the message box, note that a mailmerge <Salutation> field has been entered in for you. *This field will be replaced in the actual email (after it is sent) by whatever appears in the PG1 Salutation field (if this salutation field has not been edited, then by default, the Salutation field will be a copy of the Title, First name and Surname that appear for the PG1 contact merged together).*

Enter the text you want to include in the email remembering to think about the attached documents you are sending.

- Click on the **Attach files** button to attach any documents if necessary – they will appear next to the **Attach Files** link
- When you are ready to send the email, click the **Send** button (bottom right of screen)

You will see a message appearing:

Your letter(s) are queued for sending. This may take a few minutes. On success, you can find the entries in the Communication History screen.

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9. Click OK

You will be returned to the main **Communication Centre** screen

10. Click on **Communication History** link

> the **Emails** tab is the default view which displays the latest email sent and the detail of the content of the email is displayed in the right-hand pane.

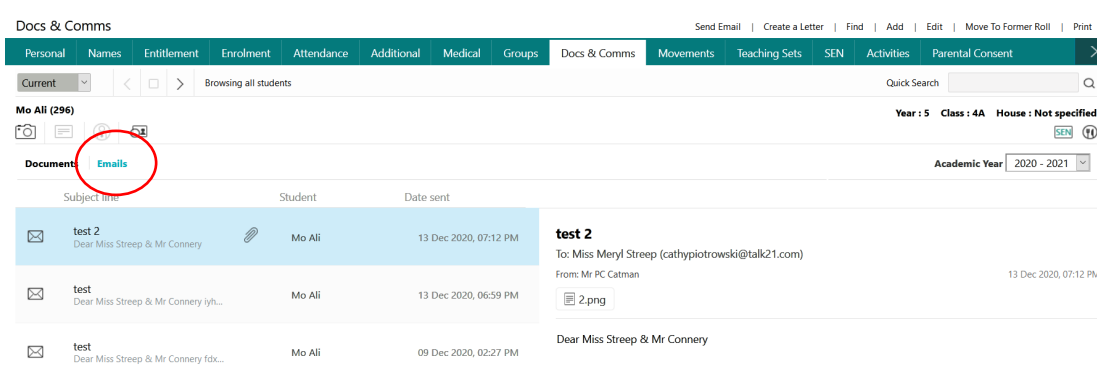
Click on each email listed to view the content on the right.

You can view a list of emails sent to an individual pupil by searching for a **Student**

You can view list of emails sent relating to a subject by searching for a **Subject**

11. Each email sent to each pupil's parental contact **will automatically be stored** in the pupils' **Docs & Comms** section of their pupil record.

Go to Modules > Student details > locate the pupil required > click on their Docs & Comms tab > click Emails



As with *Communicate History*, you will be able to see an historical list of emails sent to the contact(s) of the pupil selected. By selecting each email, the content of the email is visible on the right hand side.

These emails will also be transferred across to Parent Portal automatically.

**** * Notes about choice of recipient:**

If you select the Parent/Guardian1 option **or** the Parent/Guardian2 option, the email address used will be the one recorded against the Parent/Guardian1 or Parent/Guardian2 email respectively. If you tick **both** the Parent/Guardian1 box and the Parent/Guardian2 box and if the same email address is used in both PG1 and PG2, then the email will be received twice.

The Family Mail Marker field is located in the Family tab of the Student Details screen when in edit mode. The Family Mail Marker is used to identify which of the PG1 and PG2 contacts should be used as the main contact for communications (usually following details received by parent/carer through the New Pupil Form). In some cases, it is just the PG1 contact email address and in other cases where there are split responsibilities, PG2 contact can also be identified as a Family Mail Marker.

If you select the 'All contacts with Family Mail Marker' option, then the email address used will be the email address recorded against the PG contact(s) that also have Family Mail Marker selected. If the same email address is used for both contacts, then the email will be received more than once. This option can be used to reduce the number of general emails sent where siblings may be included in the Browse Set.

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*****Selecting a group of pupils for Send Email

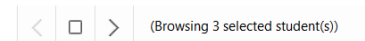
You can select your group of pupils in two ways – either through **Student Details** or **Communication Centre**:

Go to **Modules > General > Student Details**

> click **Find** (top-right option) and select a group of pupils (either by using CTRL & Click to select individual pupils from a list or by selecting a Year group or class group etc.)

> click **Select** and click **Yes** to the prompt

> the pupils are now held within a **Browse set** as indicated on screen



> then click the **Send Email** link

The following **Send Email** screen will display your selected pupils – you can at this point click the **Bin** icon to remove any from the selection/ check for missing emails. **Now follow from step 2 above**

Select an option:
☒ Student(s)
☐ Year group
☐ Class
☐ House
☐ Group
☐ All Students

Search and add:
[Go to Student Find](#)

Select Recipient Options
☒ Parent/Guardian 1
☐ Parent/Guardian 2
☐ All contacts marked having Parental Responsibility
☐ All contacts marked as Family Mail Marker
☐ All contacts marked as Student Resident
☐ Student

Student	Recipients name	Email	Relation	Res	Par	Mail	Emrg
Mo Ali (Ref: 296, Year/Class: 5/4A)	Miss Meryl Streep	<input checked="" type="checkbox"/> someone@somewhere.com	Step Mother			Yes	1
Luce Ball (Ref: 217, Year/Class: 4/3A)	Mrs Boo Ball	No email address	Mother			Yes	1
Archie Andrews (Ref: 286, Year/Class: 5/4A)	Mrs Julie Andrews	<input checked="" type="checkbox"/> andrews@soundofmusic.com	Mother			Yes	1

OR

Go to **Modules > Communicate > Communication Centre > Send Email** > click on the **TO** button

Select an option:
☒ Student(s)
☐ Year group
☐ Class
☐ House
☐ Group
☐ All Students

Search and add:
[Go to Student Fir](#)

Click on **Year Group** option > click in the **Search and Add** box to view list of year groups and select each year in turn (as each year group is selected, the pupils in each are displayed on the right) and then click **Add Selection**

Repeat as above for **Class, House & Group**.

To select ALL students, click the **All Students** option button and then click **Add Selection** – you should see total number of students appear in the To box.

Then follow from step 2 above.