Configuring Email and Archiving Reports from the MBA Report Creator

This document will allow you to configure the email functionality in the MBA Report Creator as well as using the Email functionality to send reports to student contacts via email and the public portal. This document will also allow for archiving reports in the MBA Report Creator which is a way to publish and store the reports you run.

Overview
This document will cover the following process: Configuring and Using the Email Function in MBA Report Creator

Step 1 Configure the Email Options in the District Office
Step 2 Emailing Reports to student/contacts after they are run
Step 3 Archiving Reports (Publishing them to the Parent Portal and Storing them in PDF format)
Step 4 Deleting an Archived Report for a specific student and re-running the report and archiving it for the specific student.
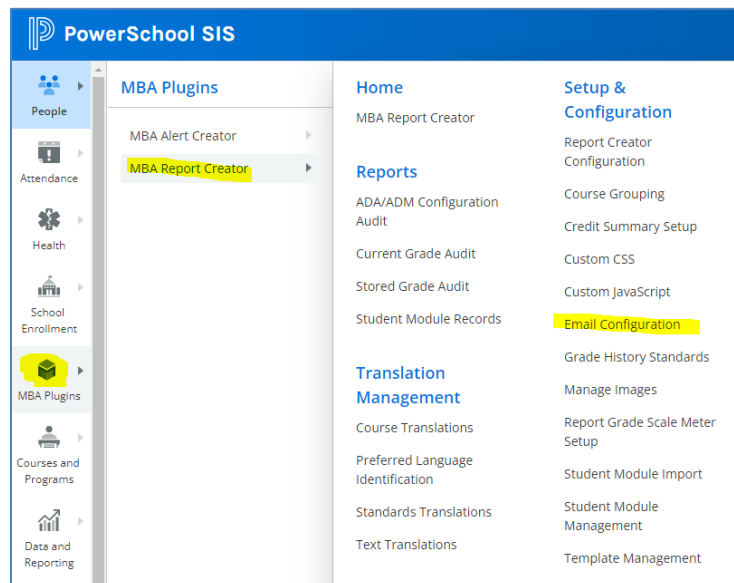Step 5 Report Views and Digital Signature
Step 6 Best Practices when Archiving Reports

MBA Report Creator:

1. **Configuring the Email Options in the District Office:**
   ☐ Navigate from the District Office **Start Page > MBA Plugins > MBA Report Creator > Setup & Configuration > Email Configuration**

- ☐ Disable Email:
  - o **Disabled**-You can choose to disable this feature by checking the box
  - o **School Override**-Allow the school to enable/disable the email functionality(If checked the school settings will override the district settings)
- ☐ Guardian Email Source
  - o **Select Student Contacts**-This is what we use in PowerSchool, the Guardian field is a legacy field we are not using
  - o **Select who will receive the email**- if you select multiple options the contact may receive multiple emails. For example if the Contact has Custody and Lives With checked they will receive 2 emails
- ☐ Password Protection
  - o **Protect as Default**-This option forces the use of a password to view the document, and that password default is the students ID number
  - o **Runtime Override**-Allows the default protection to be overridden at the time of emailing the reports
  - o **School Override**-Allows the school to set password protection preferences. If this box is checked it will allow the school to Override the District Settings
  - o **Student Identifier**-This is the Subject of the emails sent to the students contact, you can select one of the fields in the drop down arrow
- ☐ Click **SUBMIT**

Report Creator Email Configuration

Disable Email

- ☐ **Disabled** - Disable BrightArrow email functionality.
- ☐ **School Override** - Allow schools to enable/disable email functionality. If allowed, school settings will override district settings.

Guardian Email Source

Please select the source(s) for the guardian email address that will be used by the MBA Report Creator.
- ☐ **Guardian Email Field** - The student field "guardianemail" (entered on the student Demographics screen)
- ☑ **Student Contacts**
  - ☑ Custody   ☑ Data Access   ☑ Lives With   ☑ Receives Mail
- ☐ **Extended Field** - Choose up to four student extended fields

Password Protection

MBA reports are converted to PDF and delivered as email attachments. The attached files can be protected with the Student Number as the PDF password.

- ☐ **Protect as Default** - Password-protect PDF files using Student Number
- ☐ **Runtime Override** - Allow override of default protection setting at runtime
- ☐ **School Override** - Allow schools to set password protection preferences. If allowed, school settings will override district settings

Student Identifier

A student identifier is included in the subject of emails sent to students/guardians.
The default is the student's first name ([students]first_name).
If there is an alternate field that should be used, identify the desired field here.
If the field chosen is blank for a given student, that student's first_name field will be used.

Student Name Source   First_Name

2. **Emailing Reports to Student Contacts after they are run(See documentation: MBA Running Reports):**
   [Start Page > Select Students/Grade you wish to run the report for > MBA Plugin > MBA Report Creator > Reports > Run Reports

   ☐ Select the Email with BrightArrow Option on the Preview Screen

   ☐ The BrightArrow List options for Emailing Reports opens

   ☐ Select which List you would like to Email the Report to

   ☐ Select OK

   ☐ The Message Screen will display, be sure to fill in the information for the email:
   - Choose the type of message to send(Email) > **Select Next**
   - Check the Email Settings (From Name, From Email, Subject)
   - Type your email message in the Body of the Email > **Select Next**
   - You will have several options on the Next Screen:
     • Send Message Now-This will send the message
     • Save Message-This will allow you to send the message later
     • Preview Message-This will allow you to see a preview of the message
     • Cancel-This will cancel the message you created
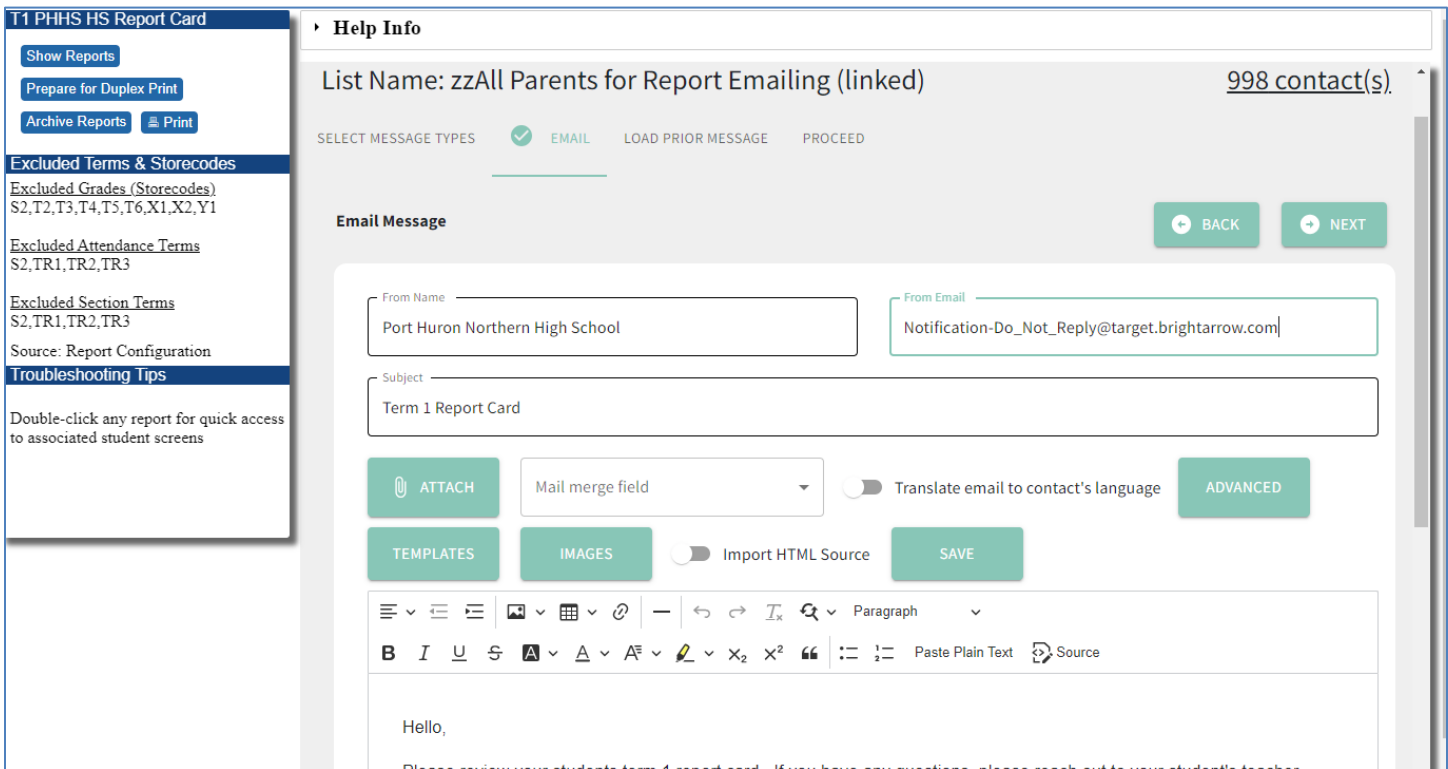
□ Navigate to the MBA Report Creator Email History to see the email history results. **MBA > MBA Report Creator > Email History** (Please note that if a parent calls and says they didn't receive a communication from the school they should check their spam folder)
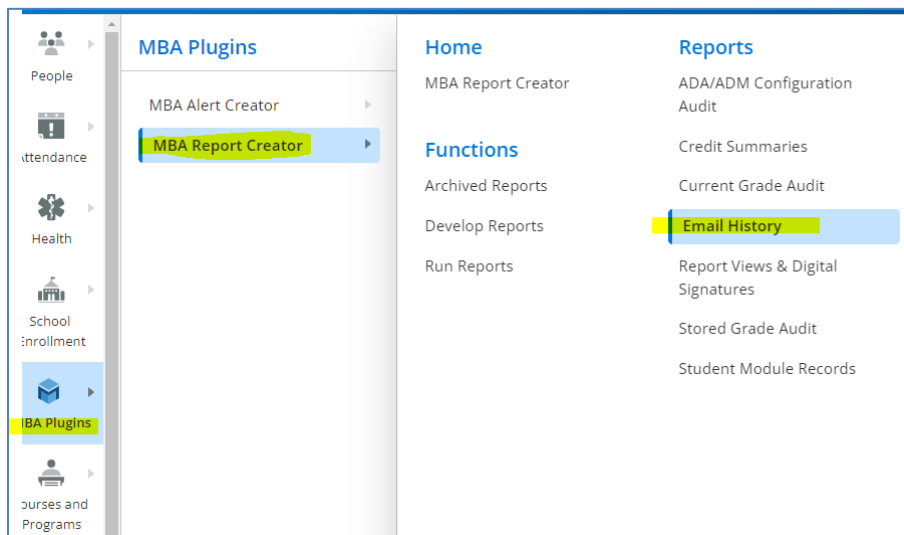
Email History ⭐

Please Note:
Reports may take several minutes to compile and send - especially for large groups of students.
If a report has no content or contents do not reflect all intended recipients, please check back later for an updated status.

Reports of Messages

Search by name, email, or phone 🔍   **REPORT FILTERS**

ALL MESSAGES   MONTHLY TOTALS   ALL PORTAL USER EDITS   TEXTING OPT INS   BRIGHTCHAT LOGS

```
* All Messages *
11/13/24 07:13AM: zzPHHS Parents for Report Emailing    ←  Once you click on the Report, it will open in
11/13/24 07:13AM: zzPHHS Parents for Report Emailing        another screen and list all of the contact
11/12/24 04:46PM: zzPHHS Parents for Report Emailing        information and email addresses that it tried to
11/12/24 04:46PM: zzPHHS Parents for Report Emailing        send the email to. There is also an option to
11/08/24 03:47PM: zzPHHS Parents for Report Emailing        Export to a PDF or CSV File.
11/08/24 03:47PM: zzPHHS Parents for Report Emailing
```

☐ Click on the Message in the list that you would like to review the information for, you can click export to CSV or PDF also.

3. **Archiving Reports in MBA (After they are Run)** [Start Page > Select Students/Grade you wish to run the report for > MBA Plugin > MBA Report Creator > Run Reports>

☐ Select the Archive Option on the Preview Screen

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Missing Assignments Active Term Only-USE THIS
[Email]  [Prepare for Duplex Print]  [Archive Reports]
[🖨 Print]

Excluded Terms & Storecodes
Excluded Grades (Storecodes)
No Exclusions

Excluded Attendance Terms
No Exclusions

Excluded Section Terms
No Exclusions

Source: District Configuration
Troubleshooting Tips
Hover over any standard row to see the associated
standard identifier

Double-click any report for quick access to associated
student screens
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- ☐ Enter a Title for the Archived Report-Be as specific as possible
- ☐ Select the Portal Availability-Select where you want this report to be viewable: Admin, Teacher or Public Portal
- ☐ Select if you wish to Request a Digital Signature
- ☐ Click **CONFIRM**
- ☐ Once you Click confirm the report will be available for the portals specified.

4. **Deleting an Archived report: This can be done for the entire archived report or for specific students, this is an option for a student or group of students who had grade changes. Start Page > Select Student(s) to Delete report for > MBA Plugin > MBA Report Creator > Functions > Archived Reports**

   - ☐ From the Archived Reports Page Select from the Functions Menu:
     - o View Report-you can view the report that is archived for the entire report or the current selection
     - o Edit-You can change what portal the report is available on and remove or add the Digital Signature Request
     - o Delete Reports-This will delete the report for ALL or the CURRENT SELECTION-**MAKE SURE YOU MAKE THE CORRECT SELECTION**
     - o Run the new Report for the Selected Students Only and Archive the Report again. Follow Steps from above.

5. **Report Views and Digital Signature Start Page > MBA Plugins > MBA Report Creator > Report Views & Digital Signature**

   - ☐ If you request a digital signature you can view this information in Reports & Views, this will allow you to see who has viewed the report and if they have signed it.
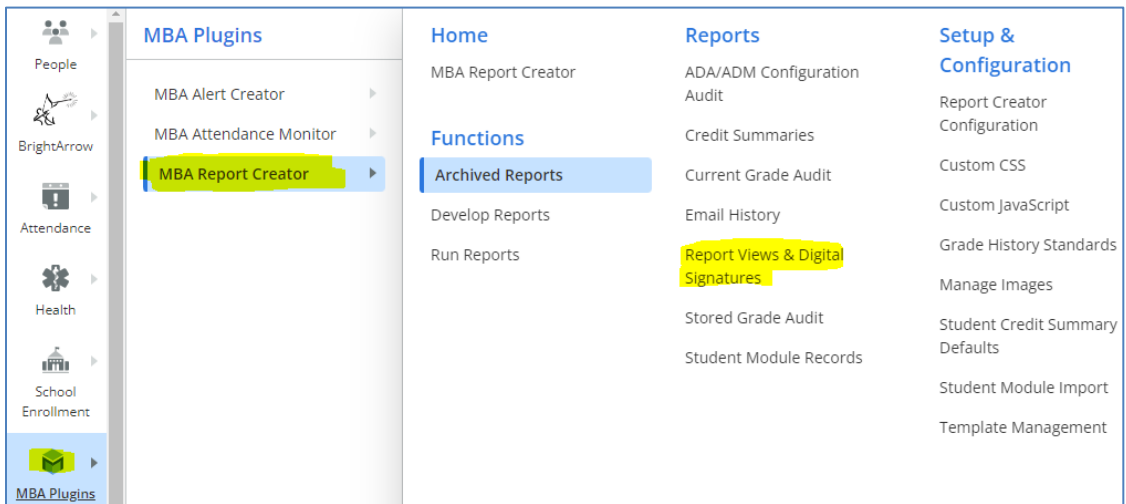
☐ Fill in the options you would like to view on the screen

☐ Click **SHOW RESULTS**
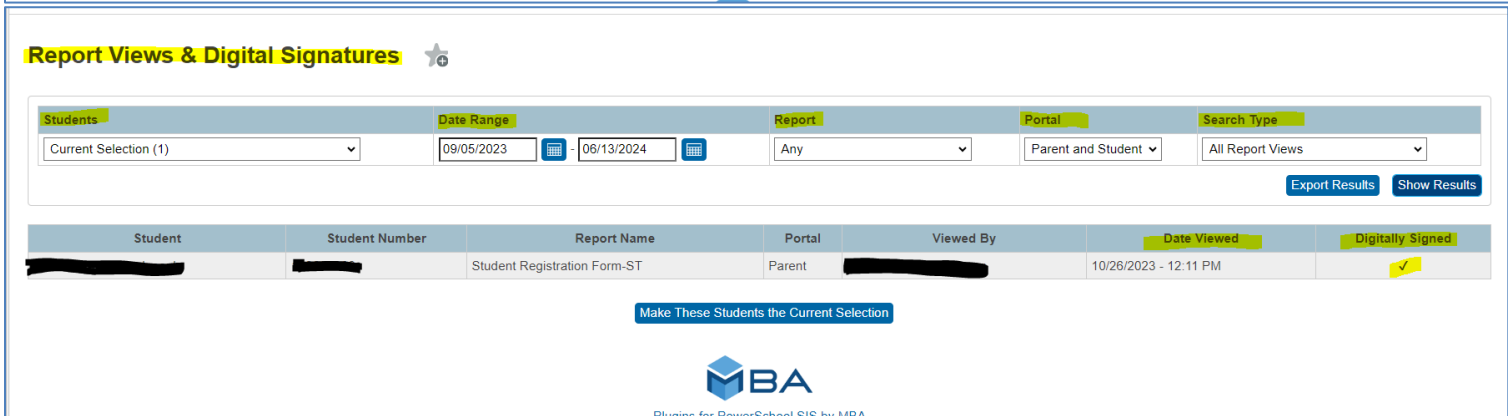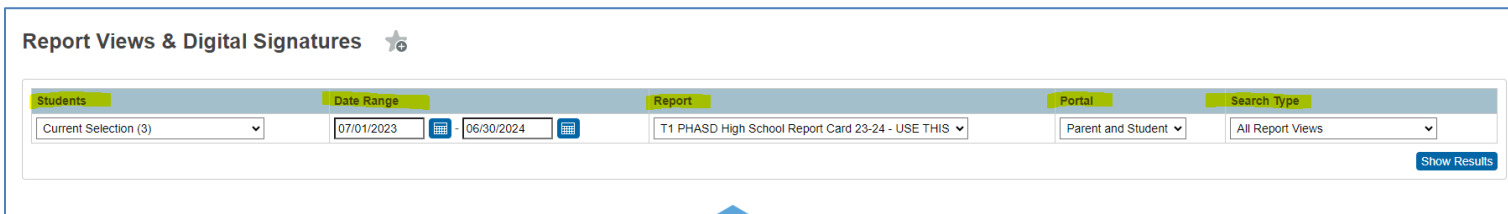
6. **Best Practice when Archiving Reports**
   - ○ Archive the reports based on Grade Level
   - ○ Name them based on Year/Term and what the report is, for example
     - ▪ **23-24 Quarter 1 Report Cards-9th Grade**

Here is a screenshot of the Archived Reports Page in PowerSchool

*Here is what the parent see's when they are logged into the Public Portal: Click **Student Reports** on the left Menu*

The parent can click on the name of the report to view and sign the report

Once the Contact Clicks on Submit Digital Signature the following will be displayed:

🖨 Print

The school has requested a digital signature confirming review of the student's report.

✓ Signature Submitted

The following information reflects what and return this form. If your email addre Portal Access.

Student Registration Form