



Getting Started

Reliance Communications, Inc.
603 Mission Street
Santa Cruz, CA 95060
888-527-5225
www.schoolmessenger.com

Index

Before you Begin.....	3
Bookmark your login page.....	3
Setting your Password	3
The Start Page	4
Getting Started	5
Making a List.....	5
Creating a New List.....	5
Adding Rules to Your List	6
All School Student List.....	6
Staff List	6
Grade Level List.....	6
Test List	7
The Preview Button.....	8
Sending a Basic Phone Notification Job	8
EasyStart	8
Sending a Typed Phone, Email and SMS Text Message.....	11
Sending a Recorded Phone Message along with Personalized Email and SMS Text Message	13
Sending a Customized Notification	13
Summary Reports	14
Related Links	14
Summary.....	14
Totals	14
Appendix A – Managing Your Account Settings	16
Account Information	16
Notification Defaults	17
Display Settings	17
Appendix B – Quick Tips for Messaging	18
Be Prepared.....	18
Write your message out	18
Repeat important information.	18
Articulate Clearly	18
Create a Good Impression.....	18
Get to the Purpose of the Call.	18
Avoid Calling about Numerous and/or Unrelated Topics.....	18

Before you Begin

This guide will help you learn your way around your SchoolMessenger system so that you can easily get your message out to hundreds, thousands or even tens of thousands of people.

The intent of this training guide is to equip new users with the primary skills required to quickly and confidently send notifications.

This guide is not intended to cover every feature of the product. More advanced system features are spotlighted along with references to the online help section where they are covered in greater depth.

If you're already comfortable with the basic features of the system see the *Advanced Training Guide* located in the help system.

Bookmark your login page

The first step in developing your knowledge of the system is to log in and familiarize yourself with the location of some of the basic system features.

Enter the web address for your SchoolMessenger login page into any web browser. This will take you to the *Login Page*. *[Note: If you do not know the web address of your login page, contact your district's SchoolMessenger system administrator.]*

Before continuing be sure to bookmark the login page on any computer that you intend to use to send notifications (your work and home computer). You should also write down the address and carry it with you in your wallet or purse. Every customer's login page is unique, so you should not expect that you will remember your specific login URL in the event that you are away from your personal computer and need to access the system.



Setting your Password

If you already have a username and password skip this section and simply log into the system. If you have a username but no password, follow the steps below to set your password and log in.

1. Click the *Forgot your password* link. You will be taken to the *Password Assistance* screen.

Password Assistance

To begin the password reset process, enter your username.

Username:

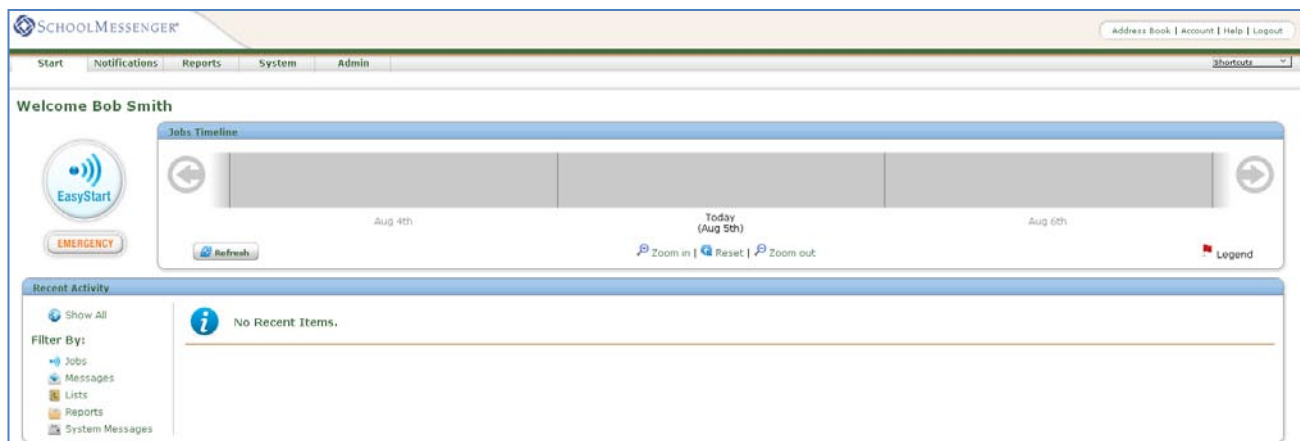
Confirm Username:

[Return to Login Page](#)

2. Enter the username provided to you by the system administrator in both the *Username* and *Confirm Username* fields.
3. Click the *Send Password Reset Email* button.
4. Check your email inbox for an email with the subject *Reset Password*.
5. Click the link in the email, and you will be directed to a web page where you can reset your password.
6. Enter and confirm your new password. For rules regarding passwords, please see *Appendix A: Managing your Account Settings*.
7. Click the *Submit* button, and you will be logged into your account using the new password.

The Start Page

The *Start Page* will be referenced frequently throughout this guide. Whenever you need to return to the *Start Page* simply click the *Start* tab at the top left of the screen.



The *Start Page* contains the following tools:

EasyStart: This is the button to click whenever you want to create a non-emergency notification.

Emergency: This is the button to click whenever you want to create an emergency notification. Note that not all users will have access to the Emergency option.

Jobs Timeline: A graphical view of all of your recent notifications and their current status.

Recent Activity: A quick access list of recent item that you've created or edited, such as jobs, lists and messages.

[Tip: Throughout the system you will find help at your fingertips. Hovering your mouse pointer over most labels displays a small message with information pertaining to the object in question. If Hover Help does not answer your question or provide you with enough information many pages include an interactive Guide button in the top right corner of the page.]

Getting Started

SchoolMessenger is used to send *notifications*, also referred to as *jobs*, via the phone, e-mail, SMS text or any combination of the three.

Sending a message to a small group, to hundreds, or even to thousands of people is simple. The process of sending a message can be broken down into three basic steps:

Step 1	Determine WHO you are going to call.	Make a List
Step 2	Decide WHAT you are going to say.	Create a Message
Step 3	Select HOW and WHEN you want to do so.	Schedule the Job

Making a List

The first step in sending a message is to create a list of people who will receive it.

[IMPORTANT: Most lists you create will update automatically each time new data is imported into your account. For most customers this occurs each day. That means that lists can be used over and over, and they will always stay current. For example, if you create a list of all of your students you can reuse that list forever, since any adds/drops/changes will automatically be reflected in the list with each data upload to your account. In other words, you shouldn't need to create a new list each time you send a new job.]

Creating a list is simple. In a later section of this guide (*Test List*) you'll learn how to create a simple test list that you can use to send test messages to yourself. Follow the steps below to create a simple rules based list:

Creating a New List

1. Click the *Notifications* tab. Then click the *Create a List* button.

The screenshot shows a web interface titled "List Editor: All Students". Below the title is a sub-header "List Editor". There are two input fields: "List Name" with a green checkmark icon and the text "All Students", and "Description" with a green checkmark icon and an empty field. Below these fields, it says "Total 0". To the right of the total is a green button with a white checkmark and the word "Preview".

2. Enter the name for your list. (For example, "All Students" or "Staff"). Be sure the list name describes the contents of the list – not the type of message you are planning to send.

Adding Rules to Your List

One of the easiest ways to add a group of people to your list is by defining rules. Rules allow you to define groups of people who meet certain criteria, for example:

- All Students
- Students in a specific grade
- Only Staff

List Content

List Rules ⓘ Enter a value

Field	Criteria	Value
Contact Type	<input checked="" type="radio"/> is <input type="radio"/> is NOT	<input type="checkbox"/> Staff <input checked="" type="checkbox"/> Student

[Add](#)

Please finish adding your rule

All School Student List

1. Select the field that you wish to filter by (e.g. *Contact Type* or *School*).
2. Select the comparison operator you wish to use (e.g. *is*).
3. Select the data item(s) that you wish to include in your rule (e.g. *Student* for contact type or your *School Name* for school).
4. Click *Add* to save the rule.
5. Confirm that the *Total* count is similar to the total number of students in your school.
6. Click the *Done* button, and your *All Student List* is now saved and can be viewed or edited under the Notifications → Lists menu.

Staff List

1. Select the field that you wish to filter by (e.g. *Contact Type*).
2. Select the comparison operator you wish to use (e.g. *is*).
3. Select the data item(s) that you wish to include in your rule (e.g. *Staff*).
4. Click *Add* to save the rule.
5. Confirm that the *Total* count is similar to the total number of staff members at your location.
6. Click the *Done* button, and your *Staff List* is now saved and can be viewed or edited under the Notifications → Lists menu.

Grade Level List

You can use multiple rules to build a list. Follow the previous steps to create another all student list but name the list for a particular grade level (e.g. *12th Graders*). By adding another rule you can filter it down to only those students who are in a particular grade.

List Editor: 12th Graders at SPHS

List Editor

List Name ☐

Description

Total 1259

List Content

List Rules ☐ Remove All Rules

Rule #1

Rule #2

To add another filter rule select a field

Field

1. Select the field that you wish to filter by (e.g. *Grade Level*).
2. Select the comparison operator you wish to use (e.g. *is*).
3. Select the data item(s) that you wish to include in your rule (e.g. *the number equal to your desired grade level*).
4. Click *Add* to save the rule.
5. Click the *Done* button, and your grade level list is now saved and can be viewed or edited under the Notifications → Lists menu.

Test List

For certain notifications it is often desirable to perform a test run of the job prior to sending the message out to the entire student body. You can accomplish this by simply creating a test list and manually adding (typing) only yourself on the list.

Follow these steps to create a test list:

1. Click the *Notifications* tab. Then click the *Create a List* button.
2. Enter a name for your list (For example, "Tom's Cell and Email Only" or "My Test List").
3. Click the *Enter Contacts* button in the *Additional List Tools* section located at the bottom of the screen. You will be taken to the *Enter Contact Information* screen.
4. Add your own name and contact information. Be sure all the checkboxes are selected for each phone and email address you enter.
5. Click the *Done* button at the bottom of the page, and you will be returned to the *List Editor* screen.
6. Confirm that the *Total* count is 1.
7. Click the *Done* button, and your test list is now saved and can be viewed or edited under the Notifications → Lists menu.

List Editor

List Name ☐

Description

Total 1

List Content

List Rules ☐ Select a field to filter on

Field

Additions

Showing 1 - 1 of 1 records on 1 pages.

In List	ID #	First Name	Last Name	Language
<input checked="" type="checkbox"/>	<input type="text"/>	Steve	Smith	English

The Preview Button

Clicking the *Preview* button displays a list of all of the people that are included in your list. To remove individuals from your list simply uncheck the box next to that person's name and then click the *Done* button.

[Tip: For additional information on creating lists, please review the [Advanced Training Guide](#) in the online Help by clicking the [Help](#) link in the top right of the screen. There you will find additional information on advanced list building. This includes steps to add/remove individuals who meet or do not meet your list rules and steps for uploading files.]

Sending a Basic Phone Notification Job

Click the *Start* tab in the upper left section of the screen. Now that you have created some lists you are ready to send messages.

EasyStart

EasyStart along with the *MessageSender* allows you to quickly identify what type of messages you want to send and walks you through the steps of creating a notification using your default notification preferences.

[Tip: For information on adjusting your default settings, please see Appendix A, [Managing your Account Settings](#).]

1. From the Start Page, click the *EasyStart* button, and you will be directed to the *MessageSender* page.

The screenshot shows the 'MessageSender' application window. On the left is a 'Progress' sidebar with a list of steps: 'Job Type' (selected), 'List', 'Schedule:', 'Schedule Options', 'Confirm:', 'Review and Confirm', and 'Finish'. The main area is titled 'Job Type' and contains several input fields and options. At the top is a 'Job Name' text box. Below it is a 'Type/Category' section with three radio button options: 'Attendance', 'General Outreach', and 'Lunch Balance'. The 'Notification Method' section has four radio button options, each with an icon and a list of associated features: 1. 'Record' (microphone icon) with features: EasyCall, Record Phone Message, and Auto Email and SMS Text Alerts. 2. 'Write' (notepad icon) with features: Type All Messages, Text-to-Speech Phone, and Automatic Translation. 3. 'Record & Write' (microphone and notepad icon) with features: Record Phone Message, Type Email, and SMS Text, and Automatic Translation. 4. 'Customize' (gear icon) with features: Use Your Saved Messages and Customize Message Combination Options. At the bottom of the main area are 'Cancel' and 'Next' buttons.

2. Enter a name for your job.
3. Select the *Job Type/Category*.

[Important: This determines the way the job will be processed. For example, selecting Emergency will typically result in more phone numbers being called for each student (e.g. "Home", "Cell", "Work") than selecting General. Specifically which numbers are used for each job type is controlled by your system administrator.]

4. Select your Notification Method (How you want to create your messages). For this example choose the *Record* option. Then click *Next*.

- ✓ **Record** – Record a phone message in your voice. In addition to the phone call the system will automatically send emails and SMS text messages with links to your phone message to those recipients with the appropriate email and SMS contact information and preference settings.

[Note: Email and SMS text messaging are optional features and may not be enabled for some user accounts.]

- ✓ **Write** – Type your phone, email and SMS text messages. The phone message text will be automatically converted to a call using text-to-speech. Both the phone and email messages can also be automatically translated into the other languages defined in your account.
- ✓ **Record and Write** – Record a phone message in your voice. Type your email and SMS text message.
- ✓ **Customize** – Use the Customize option to manually select any combination of message options you require. For advanced notification options, such as selecting from previously created messages, choose Customize.

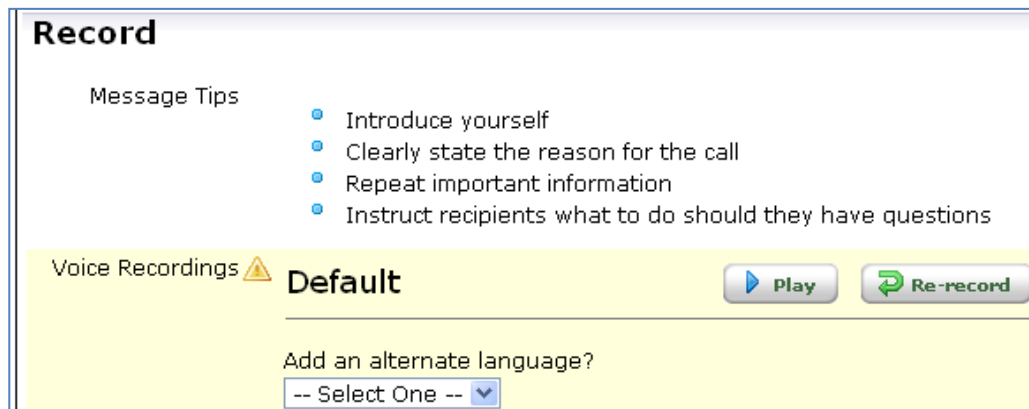
5. Click *Choose an Existing List* to select the *Test List* you created earlier. Then click *Next*.

6. In the *Phone Number* field, enter the direct access (10-digit) phone number where you are located.

[Note: SchoolMessenger cannot call extensions]

7. When you have your message prepared and ready to record, click the *Call Me to Record* button.
8. When the system calls you, follow the prompts to record and save your message.




[Important: As soon as you are done speaking, press any key to stop the recording. The message will automatically replay. You must press 1 to save your message. Hanging up the phone prior to pressing 1 will not save your message and will require you to re-record it.]




Record

Message Tips

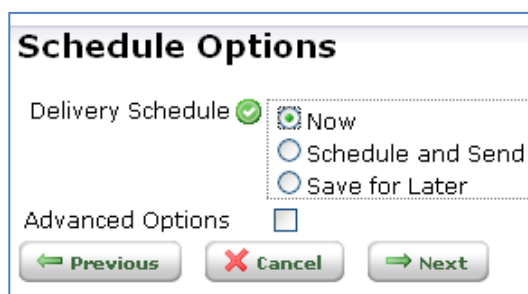
- Introduce yourself
- Clearly state the reason for the call
- Repeat important information
- Instruct recipients what to do should they have questions

Voice Recordings  **Default**  **Play**  **Re-record**


Add an alternate language?

-- Select One -- 

9. To record an alternate language version of your message, simply select the alternate language to record, and repeat the above recording steps. Then click *Next*.
10. Select *Now* to send this job immediately, or select *Schedule and Send* to schedule the job to run later. Then click *Next*.






Schedule Options

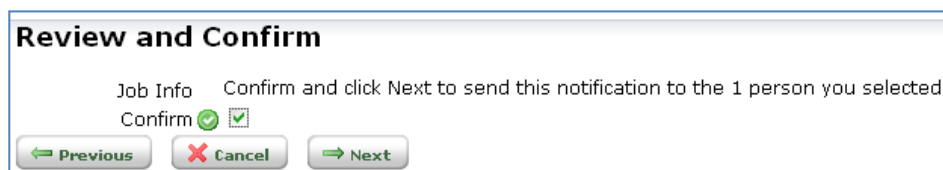
Delivery Schedule 

☒ Now
☐ Schedule and Send
☐ Save for Later

Advanced Options ☐



 **Previous**  **Cancel**  **Next**




11. On the *Review and Confirm* page review the job information. Then click the *Confirm* box.



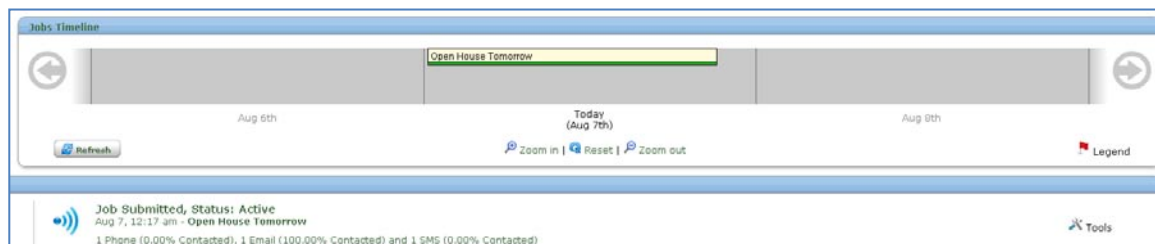
Review and Confirm

Job Info Confirm and click Next to send this notification to the 1 person you selected

Confirm  

 **Previous**  **Cancel**  **Next**

12. Click *Next* to submit your job for processing.
13. On the *Start Page* your job will display in both the *Jobs Timeline* and *Recent Activity* sections. You can monitor the progress of the job by clicking the *Refresh* button on the *Jobs Timeline* window.



14. Use the *Tools* link to the right of the job description to edit or cancel this job.

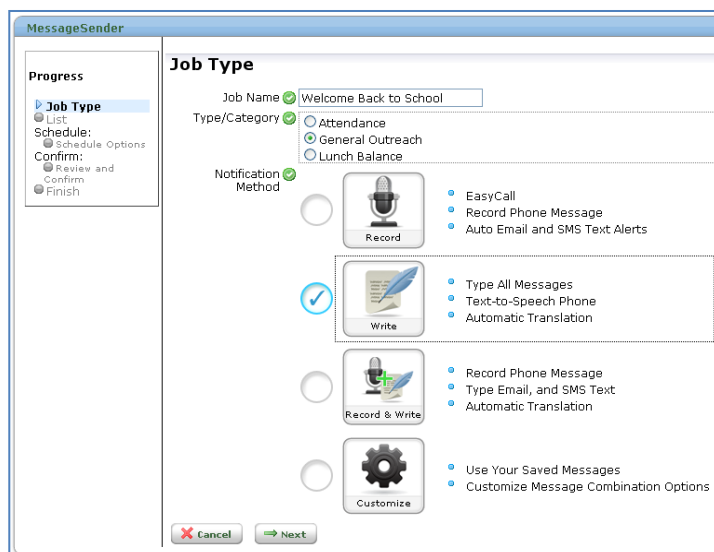
[Note: In addition to the phone call, an email and SMS text message (if enabled) will be automatically sent to the appropriate recipients with a link to your message that they can use to play it in a web browser.]

Sending a Typed Phone, Email and SMS Text Message

You can send phone, email and SMS text messages in the same notification by simply following the instructions below. Before sending an advanced notification you'll need to have your list created (see *Make a List* above).

[Important: You may not see all of the options described in this section. Certain options may not be available depending on the settings assigned to you by your system administrator.]

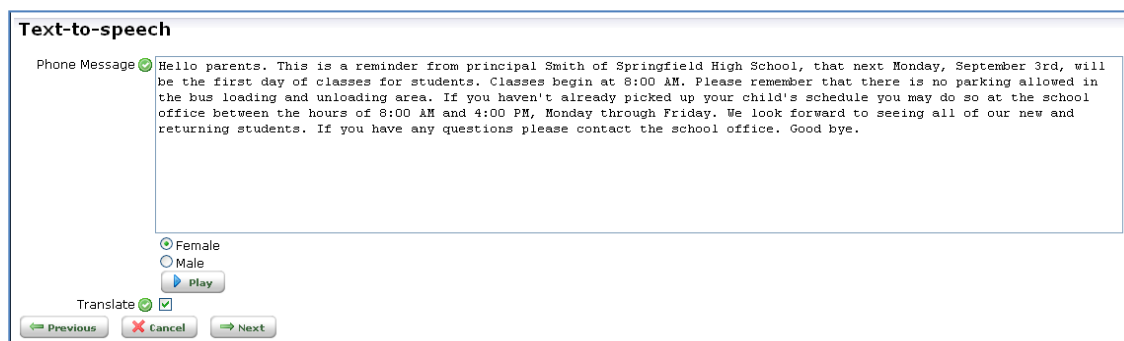
1. From your *Start Page* click the *EasyStart* button on the left of the screen.
2. Enter a name for the job, select the appropriate job type and select the *Write* checkbox. Then click *Next*.



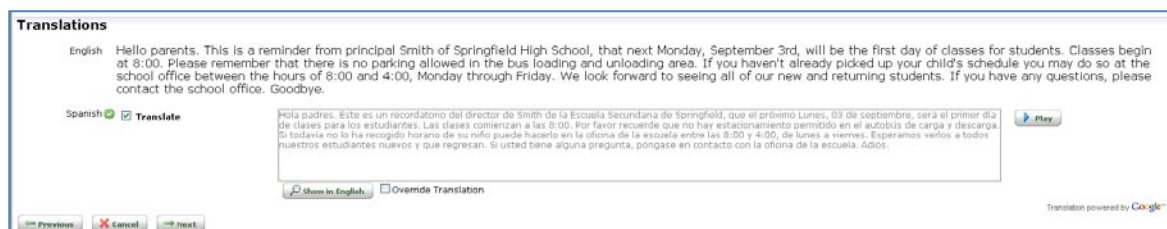
3. Click *Choose an Existing List* to select the *Test List* you created earlier. Then click *Next*.



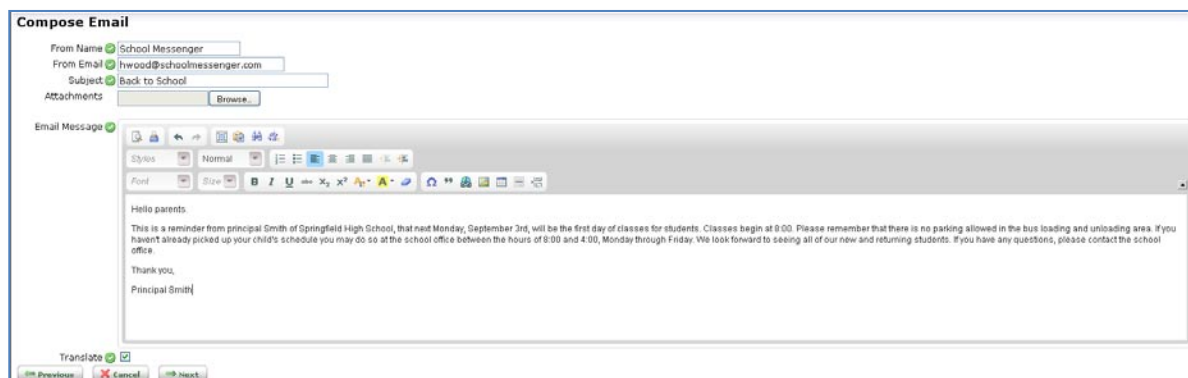
4. Type the text of the phone message that you want to send. Be sure to Play the message to ensure that it sounds correct. It may be necessary to edit the punctuation in order for your message to play correctly. It is also advisable to avoid using abbreviations wherever possible. Then click Next.



5. If you have the *multi-lingual message options* enabled you will see a translation of your phone message into one or more languages. Review the translation(s), and make any desired edits. Then click *Next*.



6. Your default email message will display. Make any desired edits to your email message. Then click *Next*.



- If you have the *multi-lingual message options* enabled you will see a translation of your email message into one or more languages. Review the translation(s), and if you prefer recipients receive your English message you can disable the translated version. Then click *Next*.

English

Default

Hello parents.

This is a reminder from principal Smith of Springfield High School, that next Monday, September 3rd, will be the first day of classes for students. Classes begin at 8:00. Please remember that there is no parking allowed in the bus loading and unloading area. If you haven't already picked up your child's schedule you may do so at the school office between the hours of 8:00 and 4:00, Monday through Friday. We look forward to seeing all of our new and returning students. If you have any questions, please contact the school office.

Thank you,
Principal Smith

Spanish

Enabled ☒

Hola padres.

Este es un recordatorio del director de Smith de la Escuela Secundaria de Springfield, que el próximo Lunes, 03 de septiembre, será el primer día de clases para los estudiantes. Las clases comienzan a las 8:00. Por favor recuerde que no hay estacionamiento permitido en el autobús de carga y descarga. Si todavía no lo ha recogido horario de su niño puede hacerlo en la oficina de la escuela entre las 8:00 y 4:00, de lunes a viernes. Esperamos verlos a todos nuestros estudiantes nuevos y que regresan. Si usted tiene alguna pregunta, póngase en contacto con la oficina de la escuela.

Gracias,
Principales Smith

Translation powered by Google

Previous Cancel Next

- The SMS Text message (if enabled) will display pre-populated with your original text. SMS Text messages may only contain 160 characters. Edit your message as necessary. Then click *Next*.

SMS Text

SMS Text ☒ This is a reminder from principal Smith of Springfield High School. Next Monday, September 3rd, will be the first day of classes beginning at 8:00 A.M.

Characters remaining: 10

Previous Cancel Next

- Select *Now* to send this job immediately, or select *Schedule and Send* to schedule the job to run later. Then click *Next*.
- On the *Review and Confirm* page review the job information. Then click the *Confirm* box.
- Click *Next* to submit your job for processing.
- On the *Start Page* your job will display in both the *Jobs Timeline* and *Recent Activity* sections. You can monitor the progress of the job by clicking the *Refresh* button on the *Jobs Timeline* window.

Sending a Recorded Phone Message along with Personalized Email and SMS Text Message

The *Record & Write* option of the *MessageSender* allows you to record a phone message and type an email and SMS Text message (if enabled). You'll use the same tools as you did in the previous two notification examples.

Simply follow the step-by-step instructions to create and send a notification of this type.

Sending a Customized Notification

If you want to choose from among all the message and job options use the *Customize* option of the *MessageSender*. For example, if you only want to send an email, use the *Customize* option. If you've already created your message using the *Message Editor*, and you simply want to select it, use *Customize*.

Summary Reports

Each of the active or completed jobs on your *Start Page* will have a *Tools* link to the right of the job name.

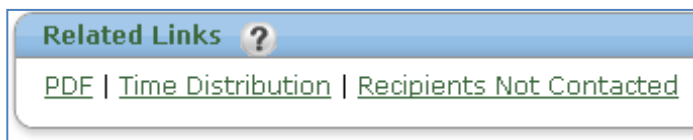


Clicking the *Report* link under the Tools menu will display the *Notification Summary*, which shows the results of that job.

A *Notification Summary* is divided into three sections, designed to give you a quick overview of what happened with the job.

Related Links

Related Links provides access to additional report features such as exporting and printing reports.



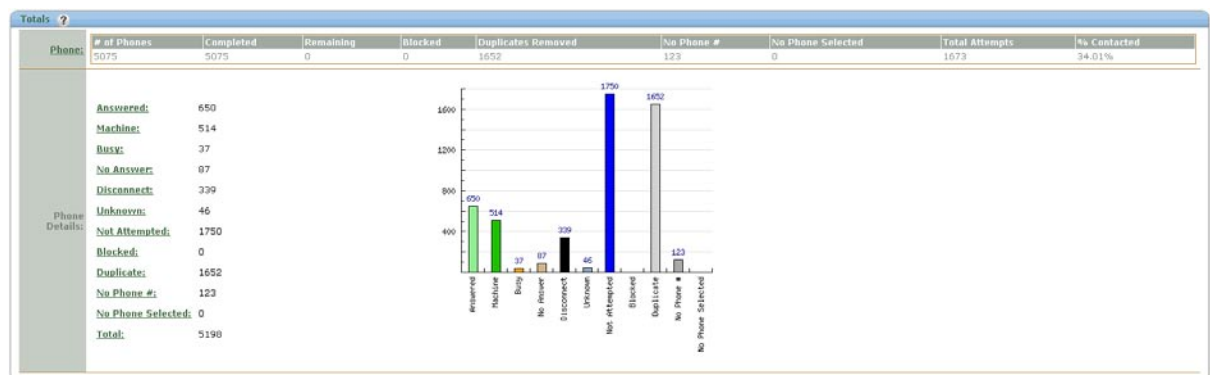
Summary

The Summary section shows a brief overview of the job settings.

Summary ?	Job Name	Job Type	Submitted by	Scheduled Date	Scheduled Time	Status	Recipients	# of Phones	# of Emails
Summary	Back to School	General	schoolmessenger	Aug 6, 2009 - Aug 6, 2009	8:00 am - 9:00 pm	Complete	5198	5075	0

Totals

The Totals section contains a breakdown of the total calls, emails and/or SMS text messages sent in both numeric and graphical format.



You can access additional information by using the shortcuts to the left side of the bar graph. For example, to get a list of all of the disconnected numbers simply click the *Disconnect* link in the *Phone Details* section.

There is a detailed explanation of each result description in the *Reports* section of *Help*.

It is also possible to generate a custom report that includes more specific information by using the *Reports* tab. For example, you can determine how many times a certain student was called specifically about attendance.

Another beneficial report allows you to determine what student ID number(s) is associated with a particular phone number.

Many types of reports can be scheduled to automatically run at certain times. This is a great way to track regularly occurring data, like all of the disconnected results for the month.

View the *Reports* section in the online Help for more information by clicking the *Reports* link in the *Contents* section on the Help menu or by reviewing the *Advanced Training Guide*.

Appendix A – Managing Your Account Settings

You may edit your account preferences by clicking on the *Account* link at the top of any screen. You will be taken to the page shown below.

The screenshot shows a web interface for managing account settings. At the top, it displays the toll-free number: (888) 527-5225. Below this is a 'User Information' header. The 'Account Information' section contains fields for First Name (Bob), Last Name (Smith), Username (bsmith), Password (masked with dots), Confirm Password (masked with dots), Phone User ID (46723), Phone PIN Code (masked with dots), Confirm PIN (masked with dots), Account Email (bsmith@springfieldisd.edu), Auto Report Emails (empty), and Phone (831-234-5678). A Password Strength indicator shows five filled circles. The 'Notification Defaults' section includes Default Start Time (8:00 am), Default End Time (9:00 pm), Call Attempts (3), Days to Run (7), and Personal Caller ID (empty). The 'Display Settings' section has Action Links (Icons and Text) and a Customize Theme checkbox (unchecked). At the bottom are 'Done' and 'Cancel' buttons.

Use this screen to view or change your default account settings.

Your toll free number is: XXX-XXX-XXXX: Located at the top of the window. This is your *Remote Call In* number that can be used to call into the system from any touch-tone phone in order to record a message and send a notification without the need of a computer.

Account Information

First Name: Your first name.

Last Name: Your last name.

Username: The name you use to log into the system. Usernames are case sensitive and must be a minimum of 5 characters long.

Password: Your login password. Passwords are case sensitive, must be a minimum of 5 characters long, and must contain at least 2 different types of characters (letter, numbers, or symbols).

Phone User ID: The ID number that you could use to log into the phone system for *Remote Call In*. ID numbers must be totally numeric and a minimum of 4 characters long that are non-sequential. Additionally you cannot repeat the same number for all characters.

Phone PIN Code: The PIN code that you could use to log into *Remote Call In*. PIN codes must be totally numeric and a minimum of 4 characters long that are non-sequential. Additionally you cannot repeat the same number for all characters, and your PIN cannot be the same as your *Telephone User ID* number above.

Account Email: Your email address. This is address that will be used when sending job completion autoreports. It is also the email address that will be used to send you a password reset should you forget your password. Be sure you enter it correctly.

Auto Report Emails: Any additional email addresses besides your account email you want your job completion autoreports sent to. Do not re-enter your account email address as it is already included. To enter multiple email addresses separate them with semicolons.

Phone: The phone number where you can typically be reached directly for recording messages.

Notification Defaults

Default Start Time: The earliest time you would typically like calls to be sent from your account by default. This will be additionally limited by your access profile, and you may have additional rights that allow you to send calls outside of these times.

Default End Time: The latest time you would typically like calls to be sent from your account by default.

Call Attempts: The default number of times you would like calls for your notifications to be attempted for numbers that are either busy or unanswered. This may be additionally limited by your access profile.

Days to Run: The default number of days you would like the system to keep your jobs active.

Personal Caller ID: This is the number that recipients will see on their caller ID. (*Note: Depending on the settings chosen by the system administrator, this value may be overridden by the toll-free call-in number*).

Display Settings

Action Links: You can specify whether you want links in the user interface to display with icons or simply as text.

Customize Theme: Check this if you would like to be able to change the *Color Theme* of the user interface for your account.

Appendix B – Quick Tips for Messaging

SchoolMessenger can be an effective instrument for building relationships with parents; the sound of the principal's voice can leave a lasting impression. The following points can help ensure that your messages are well received and understood by your recipients.

Be Prepared.

Before recording your message clearly define the content of the information you plan to send.

Write your message out.

Begin with the important information and get right to the point. Good messages always contain your name, your school and your position at the school.

Repeat important information.

Articulate Clearly.

You should speak slowly and clearly when recording messages – but not so slow as to lose the recipient's interest. It can be difficult to understand callers who speak too quickly. Write your message down and practice speaking crisply in order to be easily understood. Always listen to your message before sending it.

Create a Good Impression.

Messages are often your first contact with a parent so you want to make a good impression. Smile when you speak; people can hear it in your voice. Take a deep breath before you start recording; you want to keep your voice from trailing off. Put some energy in your voice and change the inflection; avoid sounding monotone. If you sound bored, your recipients will be less likely to pay attention. Remember, how you say something can be just as important as what you say.

Get to the Purpose of the Call.

In this age of information overload our attention span isn't what it used to be. Make it clear why you are calling and keep it brief. You generally have about thirty seconds (sometimes less) to convey your purpose before losing people's attention.

Avoid Calling about Numerous and/or Unrelated Topics.

Trying to cover a variety of complicated and/or unrelated issues in one phone message is not a good idea. Instead, break it up into multiple calls. This improves the chances that recipients will understand and remember your message.