Getting Started

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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 telephone notifications.

This guide is not intended to serve as a replacement for the detailed online help system, nor is it 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.

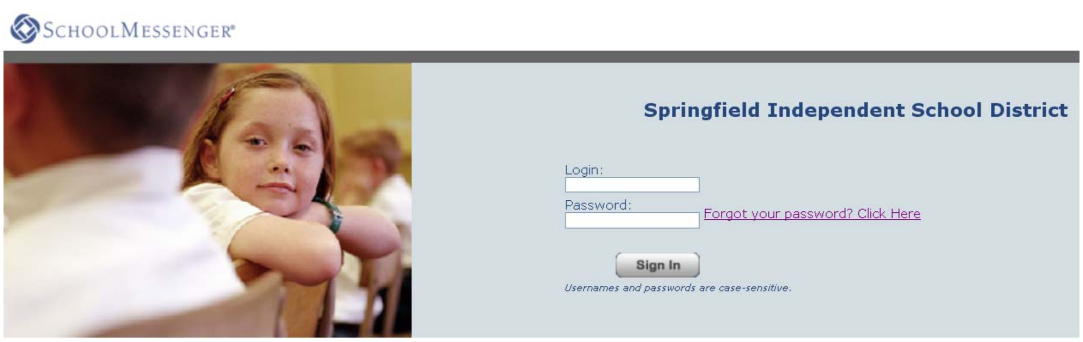
If you're already comfortable with the basic features of the system see the Advanced SchoolMessenger Guide located in the help system.

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.

Logging in

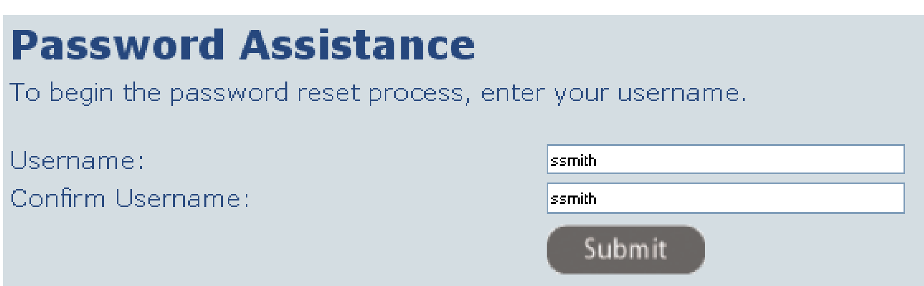
Enter the web address for your SchoolMessenger login page into any web browser. This will take you to the SchoolMessenger Home Page. [Note: If you do not know the web address of your login page, contact your district's SchoolMessenger system administrator.]

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



Setting your Password

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

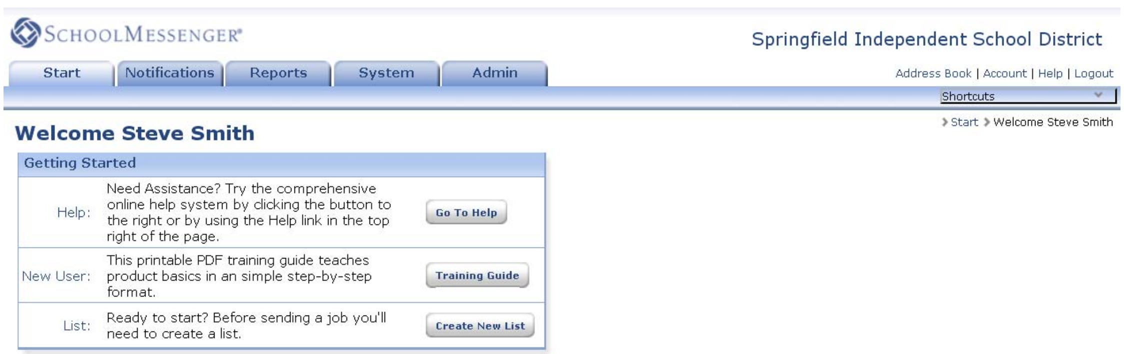


2. Enter the username provided to you by the system administrator and confirm that username.

3. Click the Submit button.
4. Check your email inbox for an email with the subject Reset Password.
5. Copy the Confirmation Code in that email.
6. Click the link to reset your password.
7. Enter and Confirm your new password. For rules regarding passwords, please see Appendix A, Managing your Account Settings.
8. Click the Submit button.
9. This will take you to the Start Page for your SchoolMessenger account.

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.



New SchoolMessenger accounts will have three buttons to select from:

Go To Help: Opens the link to the comprehensive online help section. There is also a link to the Help section in the top right corner of every screen in the system.

> [Tip: Throughout the system you will see a **?** button that provides Hover Help. Hovering your mouse pointer over the **?** 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 you can click on the **?** icon to enter the on-line Help section for more details on that specific feature/area of SchoolMessenger.]

Training Guide: Opens a PDF version of this training guide. This has been designed to show you the steps for sending a basic phone notification. This guide covers creating a list, recording a message, scheduling a job and creating a report. In the Help section you will also find an Advanced SchoolMessenger guide.

Create New List: Takes you directly to the List Editor; creating a list is the first step to sending a job.

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 a Job

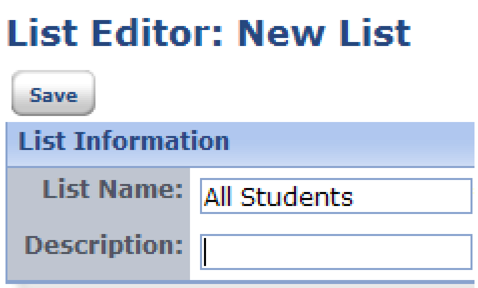
Making a List

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. In other words, you shouldn't create a new list for each job you send. For example, if you create a list of all 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. Creating a new list for each job can create problems since you will quickly end up with many duplicate lists using varying names, which could cause confusion when using some of the features of the application.]

Creating a list is simple. Follow the steps below:

1. Click the **Create New List** button on the left side of the Start page.

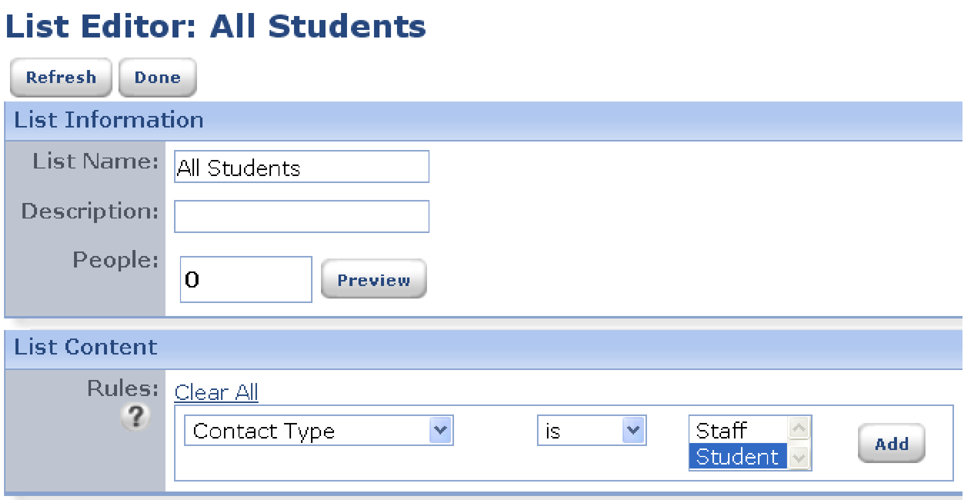


2. Enter the name for your list. (For example, "All Students" or "Staff"). Be sure the list name describes the contents of the list – **not** the type of message you are planning to send.
3. Click the **Save** button.
4. You will then be taken to the **List Editor** screen where you can add people to your list.

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



All Students List

1. Select the field that you wish to filter by (**contact type** *or* **school**.)
2. Select the comparison operator you wish to use. (**is**)
3. Select the data item(s) that you wish to include in your rule. (**student** for contact type or your **school's name** for school.)
4. Click **Add** to save the rule.
5. Confirm that the **People** count is similar to the total number of students in your school.
6. Click the **Done** button, and your 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 (**contact type**.)
2. Select the comparison operator you wish to use. (**is**)
3. Select the data item(s) that you wish to include in your rule. (**staff**.)
4. Click **Add** to save the rule.
5. Confirm that the **People** count is similar to the total number of staff 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. "12^{th} Graders"). By adding another rule you can filter it down to only those students that are in a particular grade.

1. Select the field that you wish to filter by (**grade level**.)
2. Select the comparison operator you wish to use. (**is**)
3. Select the data item(s) that you wish to include in your rule. (**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.

   [Tip: You can select multiple data items in step 3 by holding the Ctrl key (command key on the Mac) while clicking; for example, 11 and 12 for grade level.]

Test List

It is often asked how to send a test job prior to sending a call 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.

Here are the steps:

1. Click the **Create New List** button on the left side of the Start page.
2. Enter name for your list (For example, “Tom’s Cell Phone Only” or “My Test List”)
3. Click the **Save** button.

You will then be taken to the **List Editor** screen where you can configure your list:

1. Click the **Enter Contacts** button in the List Tools section located at the bottom of the screen. You will be taken to the **Enter Contact Information** screen.
2. Add your own name and contact information. Be sure all the checkboxes are selected for each phone and email address you enter.
3. Click the **Save** button in the upper or lower left corners to save the list, and you will be returned to the List Editor screen.
4. Confirm that the **People** count is 1.
5. Click the Done button, and your test list is now saved and can be viewed or edited under the Notifications → Lists menu.

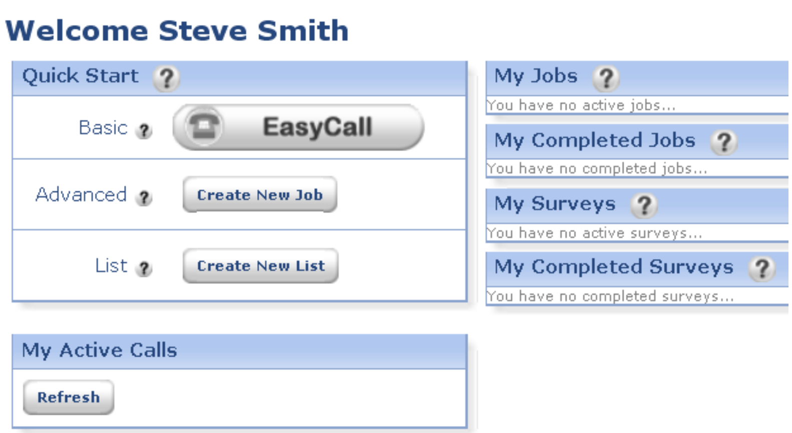
The Preview Button

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

> [Tip: For additional information on creating lists, please review the Advanced Training Guide or online Help by clicking the Help link in the top right of the screen and then clicking the Create Lists link in the QuickStart section. There you will find links to various topics on list building. This includes steps to add/remove individuals who do not/do meet the rules and steps for uploading files.]

Creating 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 phone calls. You will also notice you know have different options available from the Start Page as seen below.

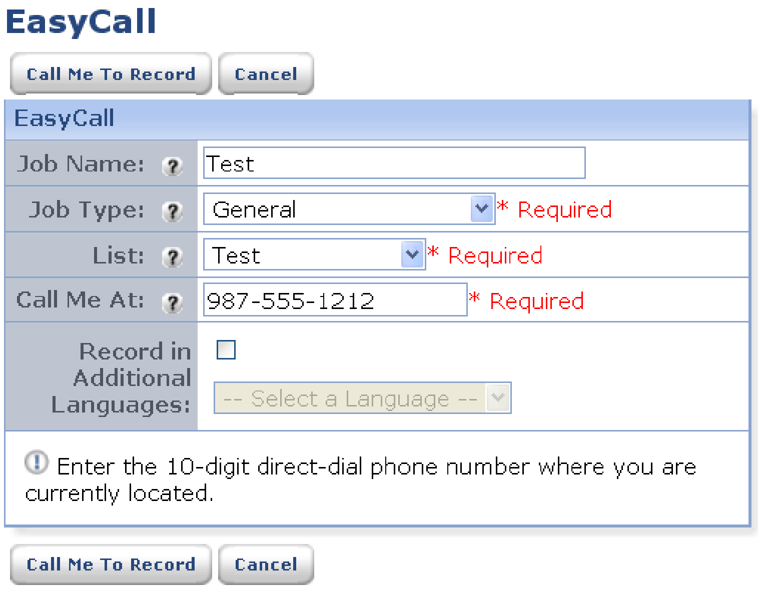


Easy Call

EasyCall combines the three parts of sending a phone notification into one easy step using the default settings under your account.

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

1. From the Start Page, click the **EasyCall** button. The **EasyCall** window will pop up.



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

   [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.]

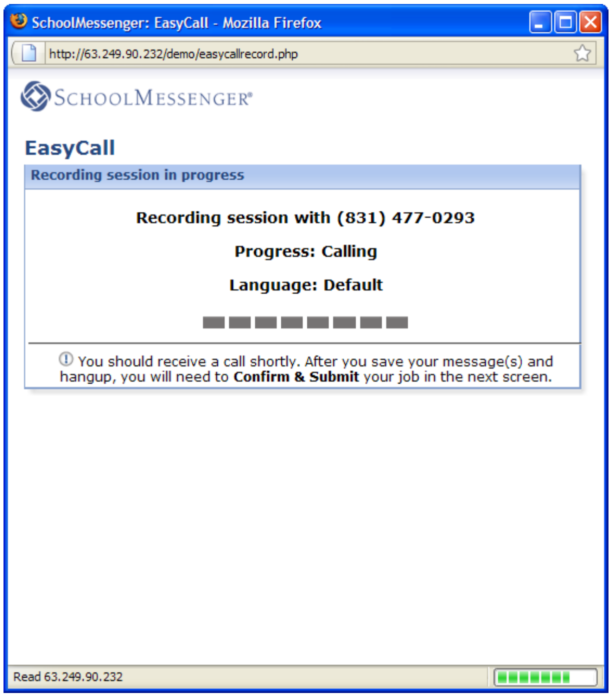
4. Select your list of recipients.
5. In the **Call Me At** field, enter the direct access phone number (10-digits) where you are located.

   [Note: SchoolMessenger cannot call extensions]

6. Check the **Record in Additional Languages** checkbox if you would like to create a multilingual job (Your will need someone who can speak the language available to record the message). Select the additional language you would like to record and click the **Add** button to the right of the drop down menu.

   [Note: If you select the wrong language, just click the **Delete** button next to the language.]

7. Click the **Call Me to Record** button. While the system is calling you, you will see the following screen:



8. When the system calls you, follow the prompts to complete your recordings. After you finish and hang up, you will be taken to the **Confirmation and Submit** screen.

[Note: You may confirm that your message sounds correct by clicking the **Play** button. If you need to change a setting in your job you may do so by clicking the **Modify Job Setting** button which would take you to the **Job Editor** screen. The Job Editor screen is reviewed in the next section **Creating an Advanced Job.** If you would like to wait and send your job later, click the **Save for Later** button where it will be stored in the **My Jobs** section of your Start page.]

9. To send this job now, do so by clicking the **Submit Job** button.

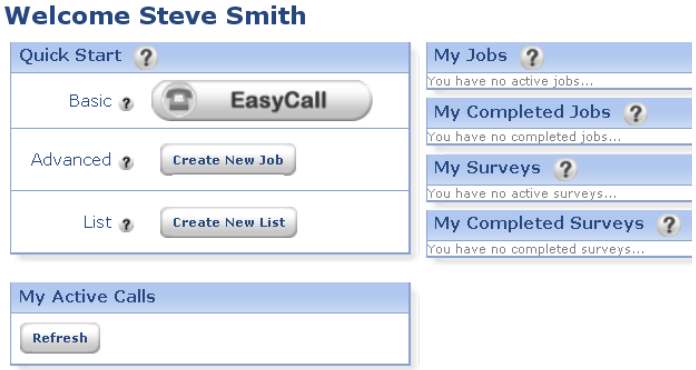
10. Your screen refreshes to the start page and your job now appears under the **My Jobs** section of the window. You can monitor the progress of the job by clicking the **Refresh** button on the **My Active Calls** window at the left of your Start page.
11. Once the job has completed *and you have refreshed the page,* the job will appear under the **My Completed Jobs** section. You can click **Graph** to see an overview of the job results or click Report to get detailed results. See the **Report** section below for more information.

[Note: The original message you sent is saved under **Notifications → Messages**. You may want to **Edit** this message name for easy identification later or simply delete it if you have no future need for it.]

Create an Advanced Notification Job

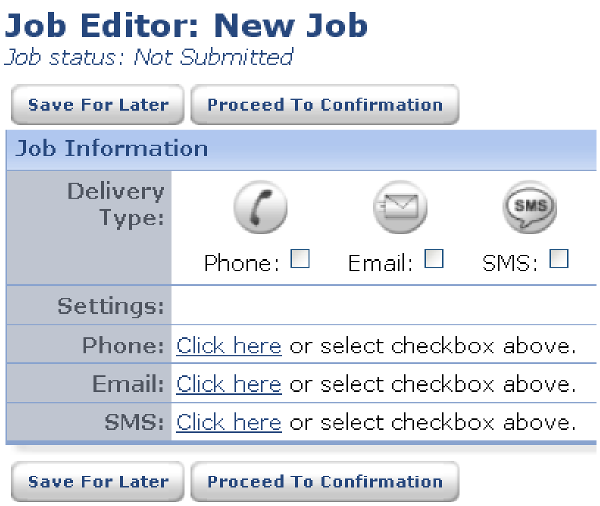
Advanced notifications are jobs that contain more than a simple recorded phone message. For example, an advanced notification might contain an email message, a text-to-speech phone message or may use automatic language message translation. Before sending an advanced notification you'll need to have your 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.]



From your Start page click the **Create a New Job** button on the left of the screen. This will take you to the Job Editor screen.

Job Options:



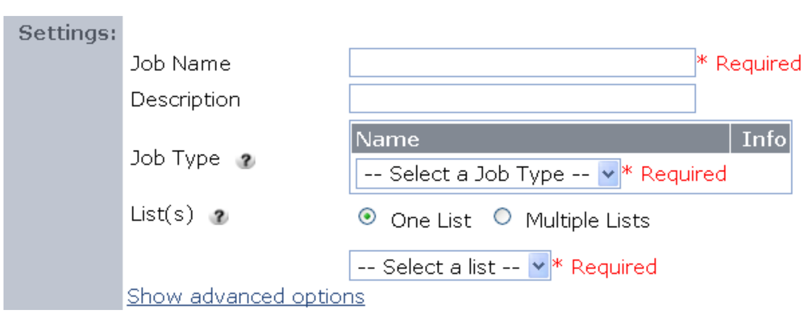
<u>Phone</u>: Check this box if you wish to send phone calls as part of this job.

<u>Email</u>: Check this box if you wish to send emails as part of this job.

<u>SMS</u>: Check this box if you wish to send SMS text messages as part of this job.

You will only be asked to set the Job Options for the notification types you select.

First you will be asked to configure the Job Settings.



Job Name: This field shows the name of the job you are about to send; descriptively naming jobs will be very helpful when looking at your reports. (For example, use "PTA Meeting Reminder" instead of "Call to Parents")

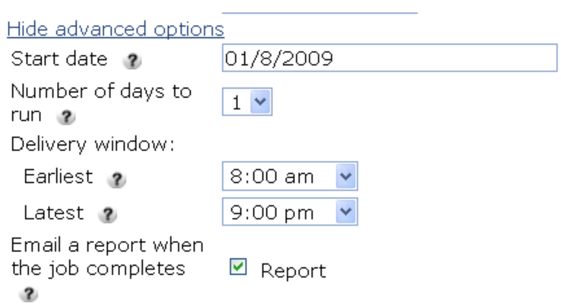
Description: Here you can add an optional description for your job.

Job Type: Select the Job Type. [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.]

List(s): Use this drop down menu to choose which list you wish to send your message to. The menu displays all of the **Lists** that you have created. [Tip: You can select multiple lists by holding the Ctrl key (command key on the Mac) while clicking.]

Advanced Job Options:

To open Advanced Job Options, you must click the Show Advanced Options link. [Note: When the Advanced Options are open the link is renamed to Hide Advanced Options.]



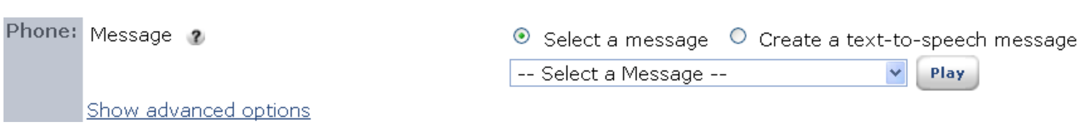
Start Date: This field allows you to set the date your job will start on. By default it contains the current date. You can schedule jobs to run for dates in the future.

Number of days to run: This setting restricts the number of days that the job may remain active.

Delivery Window: This section restricts the times during which the system can attempt to contact your recipients.

Email a report when the job completes: If this box is checked, the system will email a PDF file with the results of the job to the email address(es) specified in your user account.

Phone Message Options:



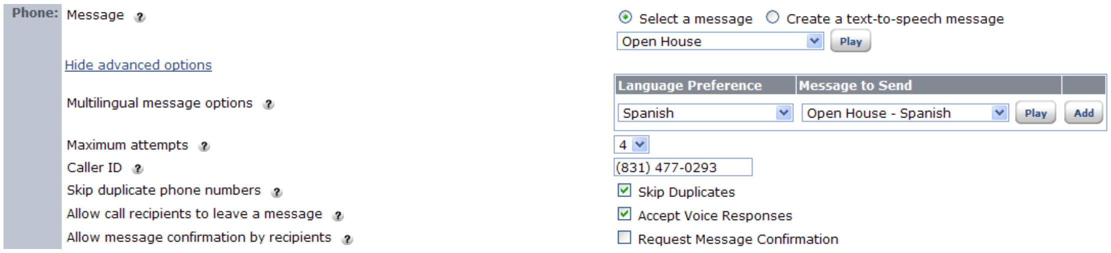
Message: This is the message that will be sent by default; typically an English message. You may use the --Select a Message-- drop down menu to select a message that you previously created using the Notifications → Messages menu, or you may create a new message using text-to-speech.

> [Tip: Messages created using text-to-speech can be automatically translated to numerous additional languages.]

Advanced Phone Message Options:

To open Advanced Phone Message Options, you must click the Show Advanced Options link.

> [Note: When the Advanced Options are open the link is renamed to Hide Advanced Options.]



Multilingual Message Options: Use these menus to set up a multilingual message. Select the language code and then the message for the corresponding language.

Maximum attempts: Use this drop down menu to select how many times the system should try to call each recipient in event the number is unanswered or busy.

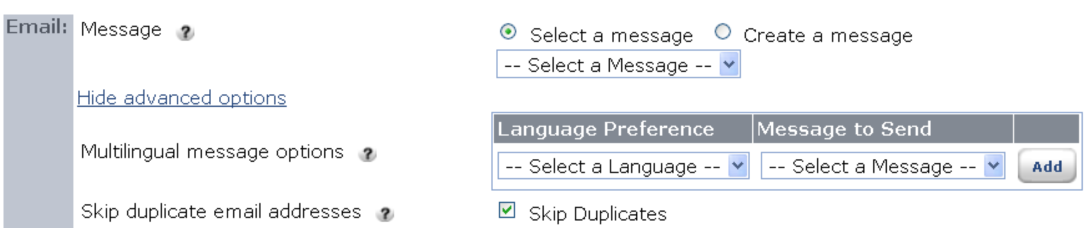
Caller ID: This is the number that recipients will see on their caller ID.

Skip Duplicate Phone Numbers: Check this box if you want each phone number in your list to be called only once. If there are multiple students from the same house, that house will only be called once rather than repeating for each student in the house.

Allow call recipients to leave a message: When you check this box, recipients will be able to press 0 to leave you a message. Responses can be played by using the link on you **Start** page that appears when you have responses.

> [Note: Response messages are stored for 30 days before being deleted.]

Email Message Options: You may use the --Select a Message-- drop down menu to select a message that you previously created using the Notifications → Messages menu, or you may create a new message by selecting Create a message. This will open additional Email Settings for configuration.



Advanced Email Message Options

To open Advanced Phone Message Options, you must click the Show Advanced Options link. Advanced Email Message options are similar to the Advanced Phone Message Options described above.

SMS Message Options

You may use the --Select a Message-- drop down menu to select a message that you previously created using the Notifications → Messages menu, or you may create a new message.

[Note: SMS messages are limited to 160 characters.]

Advanced Jobs

For information on creating messages from the Job Editor Screen with text-to-speech, email and SMS, and information on automatic translation, please review the Advanced Training Guide or the online Help.

For additional information on messages created using the Notifications → Messages menu, please review the Advanced Training Guide or online Help by clicking the Help link in the top right of the screen and then clicking the Create a Message link in the QuickStart section. There you will find information on various messaging topics such as personalizing messages to contain information that is student specific, for both phone and email messages.

Summary Reports

Each of the active or completed jobs on your Start page will have a Report link to the right of the job name.

My Completed Notifications ?

Job Name	Deliver by	Status	End Date	Responses (Unplayed/Total)	Actions
Class Rings	Phone	Complete	Nov 17, 2006 2:41 pm	- None -	Edit | Report | Graph | Responses | Archive

Clicking the Report link 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.

Related Links ?

PDF | Time Distribution | Recipients Not Contacted

Summary

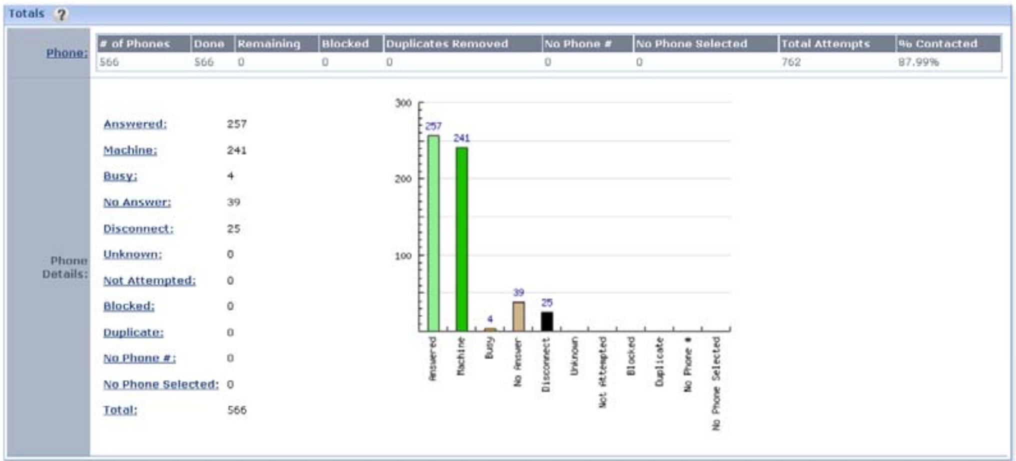
Summary shows a brief overview of the job settings.

Summary ?

	Job Name	Job Type	Submitted by	Scheduled Date	Scheduled Time	Status	Recipients	# of Phones	# of Emails
Job Summary:	Class Rings	General Outreach	sgardner	Nov 17, 2006 - Nov 17, 2006	8:00 am - 9:00 pm	Complete	566	566	0

Totals

Totals 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 **Notification Summary** 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.

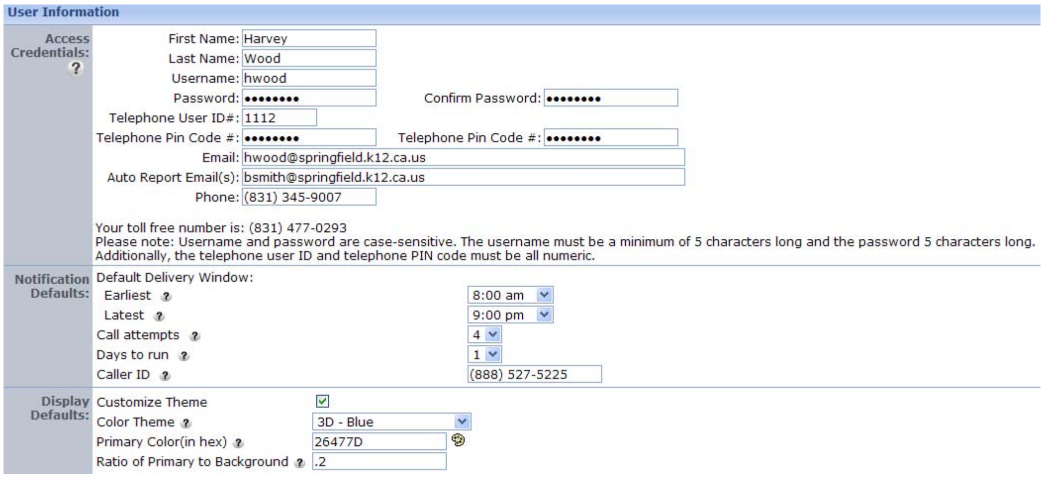
Another beneficial report allows you what student ID number is attached to a particular phone number.

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 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.



You may use this screen to change most of your account settings. Settings you may edit are:

<u>First Name:</u> Your first name.

<u>Last Name:</u> Your last name.

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

<u>Password:</u> 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, symbols).

<u>Telephone User ID#:</u> The ID number that you may need use to log into the phone system for Remote Call In. ID numbers must be totally numeric, a minimum of 4 characters long that are non-sequential, additionally you cannot repeat the same number for all characters.

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

<u>Email:</u> Your email address. This is address that will be used when sending 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.

<u>Auto Report Email(s):</u> Any additional email addresses you want your job completion autoreports sent to. Do not re-enter your email address as it is already included. To enter multiple email addresses separate them with semicolons.

<u>Phone:</u> The phone number where you can be reached directly for recording messages.

<u>Your toll free number is:</u> XXX-XXX-XXXX This is your Remote Call In number.

Default Delivery Window: The earliest and latest times 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.

Call Attempts: The number of times you would like calls from your account to be attempted by default for numbers that are 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.

Caller ID: This is the number that recipients will see on their caller ID.

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

Color Theme: Select a custom Color Theme from the options in the dropdown menu.

Primary Color (in hex): Enter the value of the color you would like for the text and shaded areas throughout the system. This needs to be the hex value for the color like you would use in HTML. You may also click on the palette icon to the right of the field to select a color from the menu.

Ratio of Primary to Background: This setting controls how much of your primary color is blended with the shaded areas in the interface. An example shaded area can be seen on the left side of the image above.

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 loose 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.