Advanced Training

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Index

Before you Begin

The intent of this training guide is to equip those familiar and comfortable with the features reviewed in the *Getting Started* training guide with information on additional features.

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.

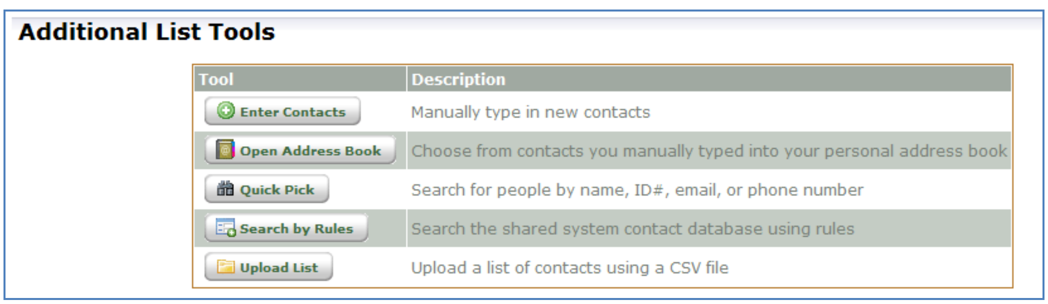
In *Getting Started* we reviewed most of the features available from the Start Page. In this guide we will review features located under the *Notifications* and *Reports* tabs in the upper left section of your screen.

Advanced List Building

When you click the *Notifications* tab you are taken directly to the *List Builder* screen. Here you will see the *Create a List* button. You will also see links to *Edit*, *Preview* or *Delete* existing lists along with information on when you last used each list. Options for adding and/or removing individuals from lists can be used alone or in conjunction with any of the other methods for list building.

Additional List Tools

Building lists with rules was covered in *Getting Started*. This guide will focus on those features available in the *Additional List Tools* section. All steps begin from the *List Editor* screen. Click the *Create a List* button to start a new list and type a name for your new list.

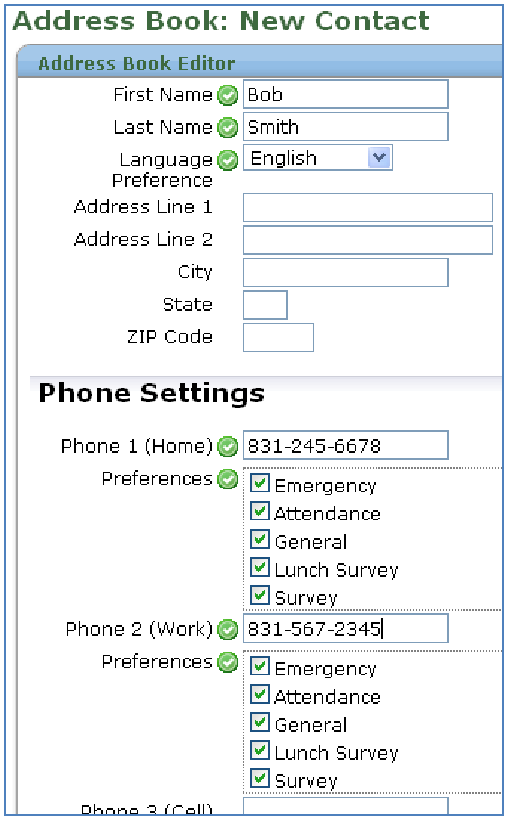

Additional List Tools

Tool	Description
Enter Contacts	Manually type in new contacts
Open Address Book	Choose from contacts you manually typed into your personal address book
Quick Pick	Search for people by name, ID#, email, or phone number
Search by Rules	Search the shared system contact database using rules
Upload List	Upload a list of contacts using a CSV file

Manually Entering Contacts

The *Enter Contacts* button can be used to manually add individuals and their contact information to your lists.

1. Click the *Enter Contacts* button.
2. Enter the individual's contact information into the appropriate fields. You may also choose how this person is contacted based on notification type preferences by checking the appropriate boxes.



3. Add *Email* and *SMS Text* phone number information as required.
4. Click the *Done* button at the bottom of the screen to add this person to your list. This will also add the person to your personal *Address Book*. You can add this individual to future lists by simply using your Address Book (See *Open Address Book* below for more information).
5. To add another person to your list, repeat the process.

[<u>Note</u>: To remove a manually added individual from your list simply uncheck the box next to the individual's name in the <u>Additions</u> section of the List Editor window, then click the <u>Refresh</u> button.]

Using the Address Book

The *Open Address Book* button opens the list of contacts previously added using the *Enter Contacts* button.

1. Open your Address Book by clicking on the *Open Address Book* button located in the *Additional List Tools* section.

[<u>Note:</u> Contacts from your Address Book can be added to this list by checking the boxes next to their names. You may <u>Delete</u> contacts or <u>Edit</u> a contact's information by using the links to the right. You may also add a contact to your Address Book by clicking the <u>Add Contact</u> button.]


Contacts ?
Add Contact

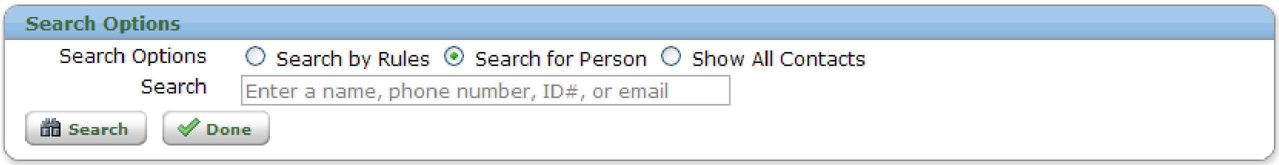
In List	First Name	Last Name	Language	Phone 1 (Home)	Email 1 (Home)	SMS 1 (Cell)	Address	Actions
☐	Frank	Harrison	English	(831) 600-1331				Edit | Delete
☐	Bill	Jones	English	(831) 855-9873				Edit | Delete
☐	Steve	Smith	English	(831) 777-5432	nheckman@schoolmessenger.com	(417) 214-0239		Edit | Delete
☐	Harold	Wood	English	(831) 876-5564	hwood@schoolmessenger.com	(831) 345-9006		Edit | Delete

2. After selecting the contacts you wish to add, finish by clicking the *Done* button.
3. If your list is complete, click the *Done* button to save your changes, or continue adding additional rules or individuals to this list.

   [Note: You can also access your address book by clicking the Address Book link in the upper right corner of your screen.]

Quick Pick

Quick Pick allows you to rapidly search for individuals in your database by entering their name, phone number, ID number, or email address.

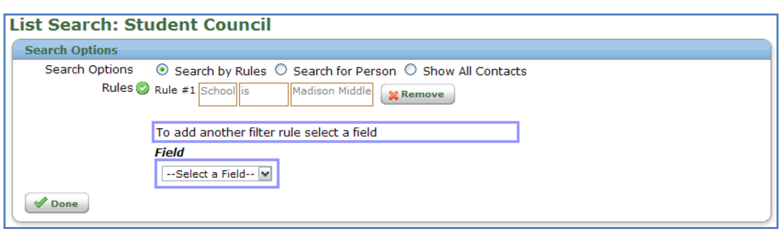


1. Click the *Quick Pick* button located in the *Additional List Tools* section to access the *List Search* screen
2. Enter the individual's name, phone number, ID number, or email address in the search field.
3. Click the *Search* button to display the results of your search.
4. Select the individual for your list by checking the checkbox next to their name.
5. Click *Done* to save your changes or continue building your list.

Searching by Rules

You can use the *Search by Rules* option to create an *ad hoc* list – a list in which the available data doesn't support creating a rule in order to create the list. Examples of lists that might be created in this way could be a Student Council list, an after-school student club or a sports team.

1. Click the *Search by Rules* button located in the *Additional List Tools* section. This will redirect you to the *List Search* window.



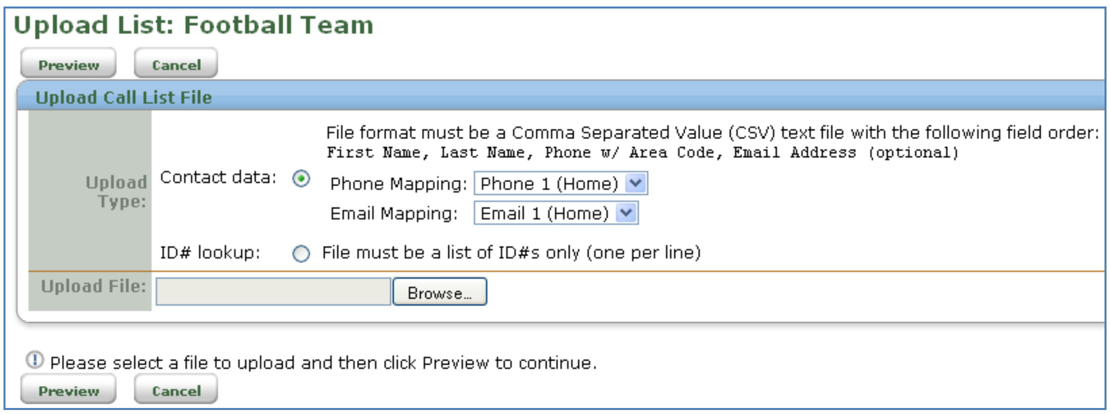
2. To filter your contacts by rules, select the search field and the comparison operator you wish to use (i.e. "is", "is not", etc.) in the *Criteria* area. Then select the data items that you wish to include in your search rule, and click the *Add* button.

3. When you locate the person (or people) whom you want to include in your list, simply click the checkbox to the left of their name. Repeat until you have selected everyone that you want included on your list.
4. When you are finished using the *List Search* window, click the *Done* button at the bottom of the window, and you will be returned to the *List Editor* window. From there you can save your list or continue by adding rules or more individuals to your list.

   [Note: To remove individuals from your list simply uncheck the box next to the individual's name.]

Uploading CSV File Lists

The *Upload List* button allows you to create a list of contacts by uploading a *Comma Separated Value (CSV)* text file.



1. Click the *Upload List* button
2. Select the *Upload Type*. SchoolMessenger can work with CSV files in two formats:

   Contact Data – Your list contains the complete information for recipients in the following order: First Name, Last Name, 10-Digit Phone Number, Email Address (optional). From the dropdown menus, select which field the phone and email information should be mapped to. For example, if all of the phone numbers should go in the Phone 1 field, select Phone 1 from the dropdown menu.

   OR

   ID # Lookup – Your list only contains the ID numbers for your recipients as they exist in your database. The system will match the recipient's contact information already stored in the system based on this number.

3. Click the *Browse* button to locate the file on your computer that you wish to upload.
4. From the drop-down menus, select which field you would like the contact's phone number and email to be mapped to.
5. Click the *Preview* button to preview your list or the *Cancel* button to exit this screen without uploading your list.
6. If your list looks correct, click the *Save* button. If you need to upload a different file, click the *Select Different File* button. If you would like to exit without saving your list, click the *Cancel* button.

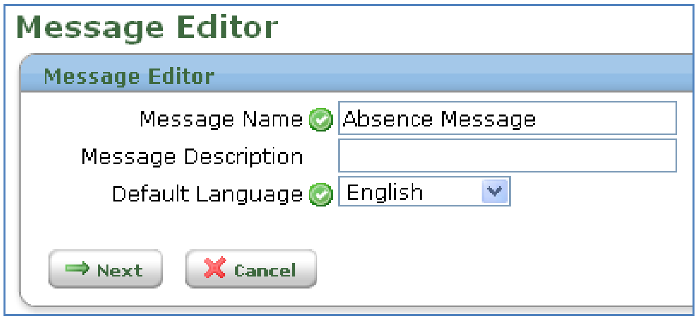
Advanced Messages

You can create simple recorded and typed messages (phone, email and SMS) using the Message Sender as shown earlier in the *Getting Started* training; however, you can create more complex, re-usable message groups that contain rich content, such as customized data field inserts, by using the *Message Builder* located under the *Messages* tab.

Creating a message group using the *Message Builder* allows you to create a single message object that contains phone, email and SMS content (in multiple languages if you choose), which can then be easily selected later from the *Message Sender*.

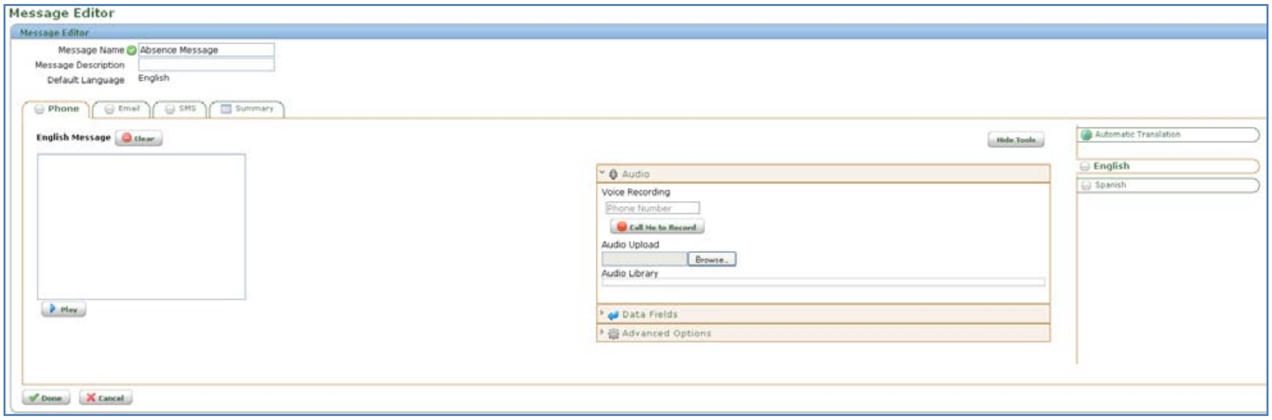
Creating a Message Group

1. To start, simply navigate to Notifications → Messages.
2. Click the *Create a Message* button.
3. Enter a name for your message, and then click *Next*.



Message Content Tabs

You will notice that the message editor consists of four tabs – *Phone*, *Email*, *SMS* and *Summary*. Use each tab to construct the message(s) you wish to deliver for that particular delivery mode. Use the *Summary* tab to determine the types of message content and translations your current message group contains.



Adding Phone Message Content

You can add phone message content in one of three ways:

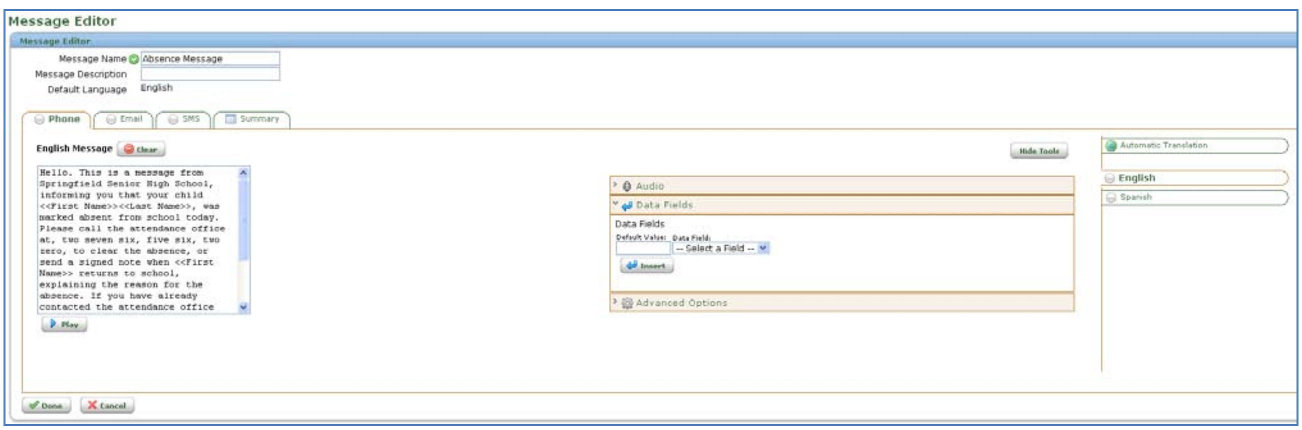
> Text-to-Speech – Type in text that will be automatically converted using text-to-speech.
>
> Call Me to Record – Use the Call Me to Record button to have the system call you in order to record the audio yourself.
>
> Audio File Upload – Use the Audio Upload option to upload a pre-recorded wav file that you wish to use.

Text-to-Speech Phone Message

Simply type the content of the message, and then click the *Play* button to hear how the message will sound when it is delivered. Use the *Advanced Options* menu to the right to change the gender of the voice. You may need to add punctuation or modify the spelling of certain words in order to get the proper effect.

To insert a data field into your message, simply place your cursor where you wish the field to be located and use the *Data Fields* option to the right to select and insert the field into your message.

You can have the system automatically translate your text by clicking the *Automatic Translation* link on the far right of the window.



Call Me to Record Phone Message

To record your phone message in your own voice you can use the *Call Me to Record* feature located in the *Audio* section of the window. In the *Phone Number* field, enter the direct access (10-digit) phone number where you are located. When you have your message prepared and ready to record, click the *Call Me to Record* button.

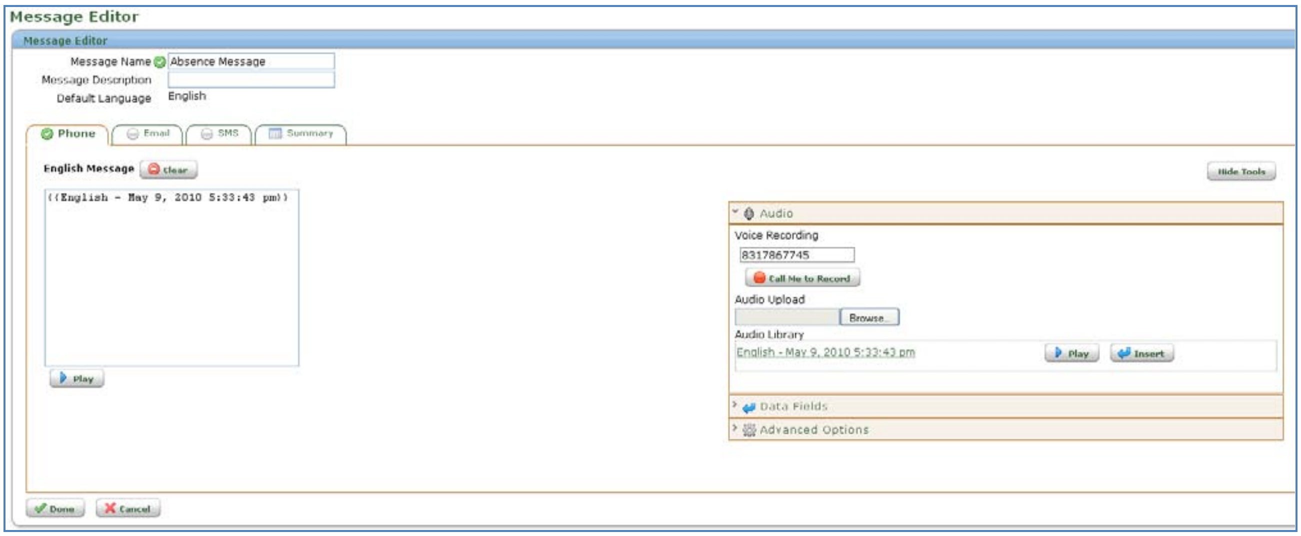
When the system calls you, follow the prompts to record and save your message.

> *[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.]*

The system will insert a textual reference tag to the recording you just made into the phone message text box to the left of the screen. The reference tag will appear similar to the following:

{{English - May 9, 2010 5:33:43 pm}}

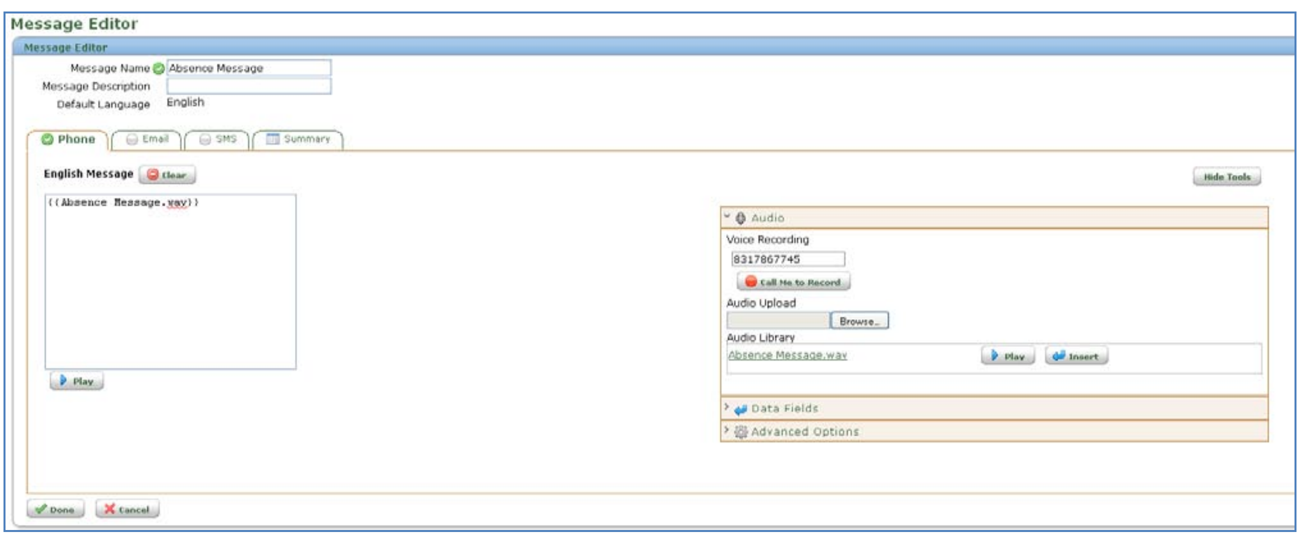
It's very important that you don't edit the tag or you may cause your message to no longer play properly.



You can concatenate *multiple recordings* into a single message by repeating the steps above. You can also *insert data fields* between your audio file recordings in order to create dynamic messages.

Uploading an Audio File into a Phone Message

If you have a pre-recorded wav file that you would like to use in a message you can simply use the *Browse* button to locate the file and upload it into your message.

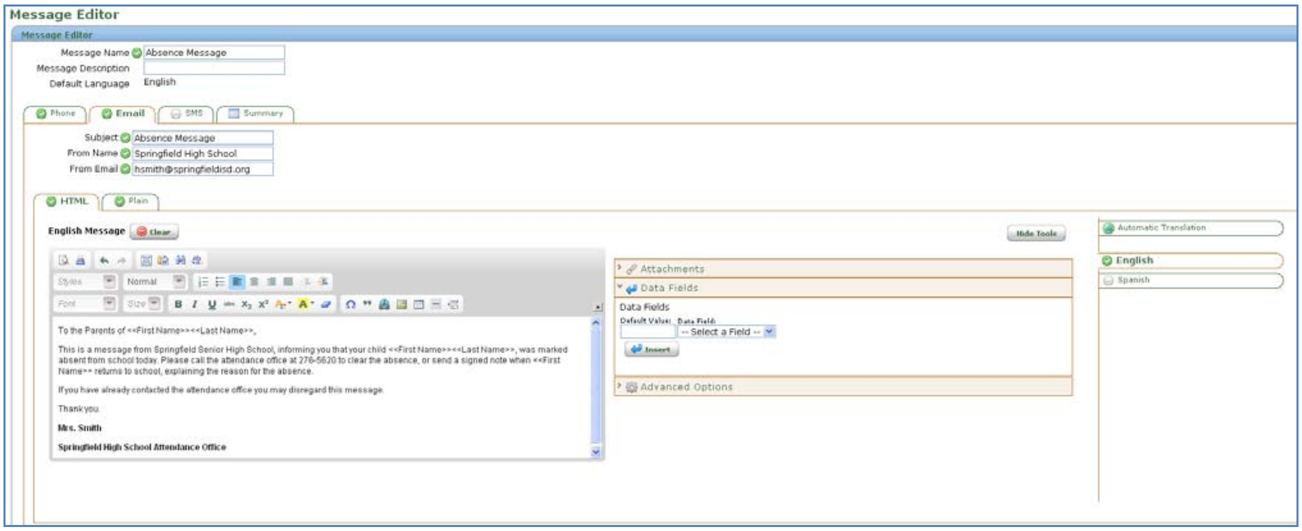


Composing an Email

Click the *Email* tab and use the HTML editor to compose and format the email portion of your message. A plain text version of the email will automatically be generated for those recipients whose email client does not support HTML. You can override the contents of your plain text version from the *Plain* tab.

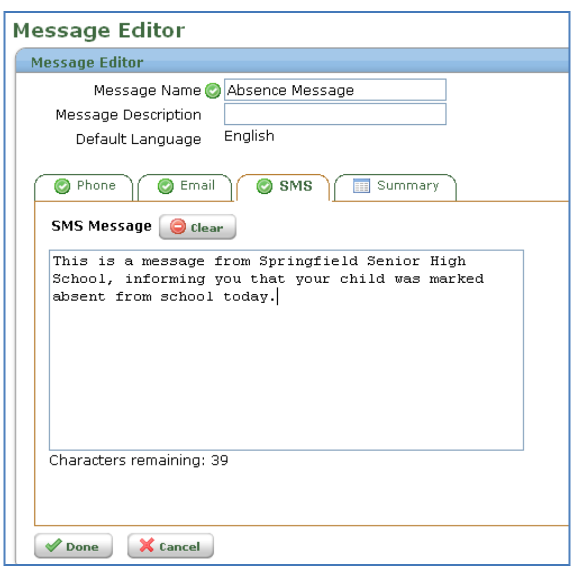
To insert a data field into your message, simply place your cursor where you wish the field to be located and use the *Data Fields* option to the right to select and insert the field into your message.

You can have the system automatically translate your text by clicking the *Automatic Translation* link on the far right of the window.



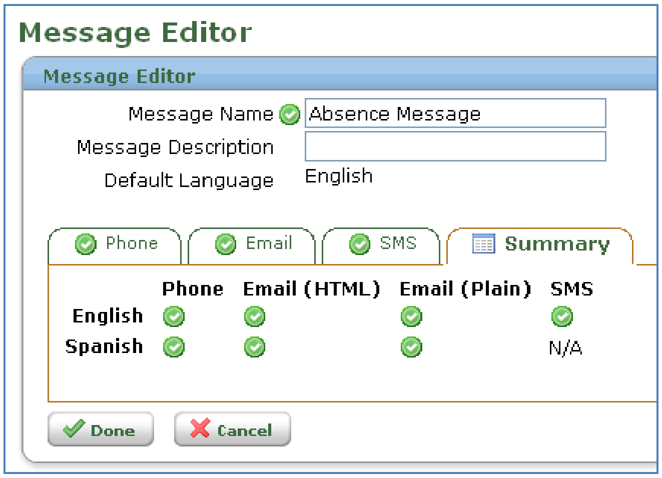
Composing an SMS Text Message

Click the *SMS* tab and use the *SMS Message Editor* to compose the SMS portion of your message. The SMS message is limited to 160 characters and dynamic field inserts are not supported. Also, SMS messages cannot be translated into alternate languages.



Reviewing Your Message Group

Click the *Summary* tab to review your message group contents. The *Summary* will display a green checkbox for each message type and language contained in this message group. You can review each message component by clicking on the green checkboxes.

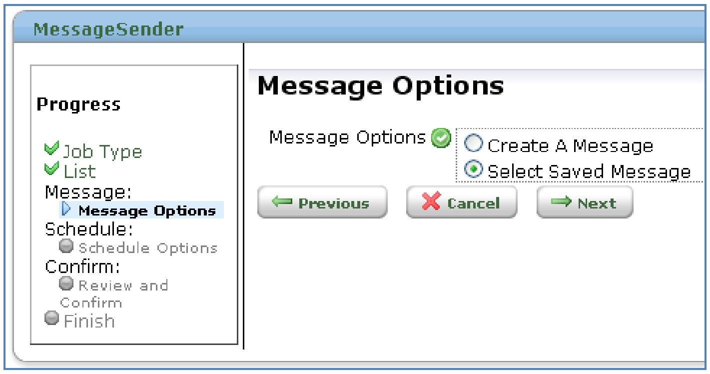


If any of the alternate language message components are not created, those recipients will receive the default language message (typically English) for that component. For example, if you don't create a Spanish version of your email message, those individuals in your notification list who are flagged with a Spanish language code will receive the English version of the email message.

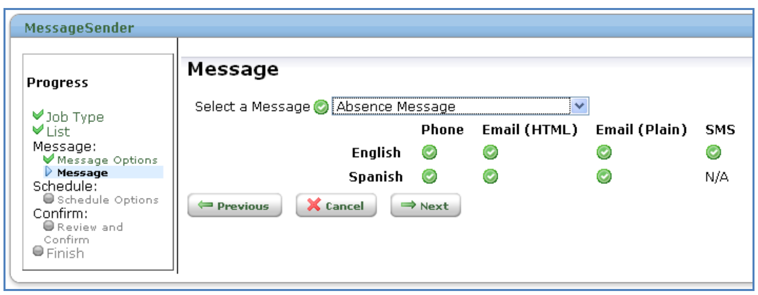
Using Your Message Group in a Job

To create a job using the message you just created, use the *EasyStart* button, and select the *Customize* option.

1. On the *Message Options* page, choose *Select Saved Message*.



2. On the *Message* page select the message you created. Click the green preview checkmarks to review any portions of the message you wish. Then click *Next*.



3. Select *Now* to send this job immediately, or select *Schedule and Send* to schedule the job to run later. Then click *Next*.
4. On the *Review and Confirm* page review the job information. Then click the *Confirm* box.
5. Click *Next* to submit your job for processing.

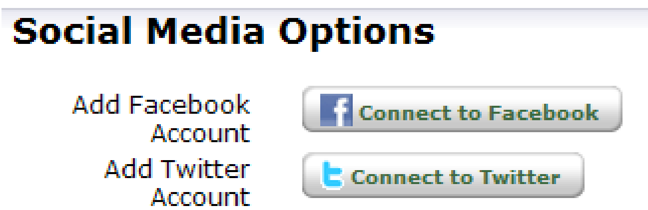
Posting to Social Media Sites

If you would like to post your message to Facebook and Twitter, you can do this right from MessageSender. You will need to allow the SchoolMessenger Facebook app to have access to your account before you can post. You can do this from the Account link at the top of any page or as you create a job with MessageSender. You will only need to grant permission once. Your permission will last until you deliberately revoke it.

Authorizing a Facebook Account

The image below shows the social media options on the Account Settings page, found at the Account link in the upper right corner of any screen. You can also access these buttons as a step in MessageSender as you're creating a job.

If you want to authorize your accounts from MessageSender, skip to the "Posting to Facebook and Twitter" section below.



1. Make sure that you are either logged into the Facebook account you wish to authorize or are not logged into Facebook at all.
2. Click the "Connect to Facebook" button.

If you are logged into Facebook already, the account you are logged into will be authorized. Otherwise, there will be a pop up window asking you to please log into the appropriate account and grant permission.

If you accidentally authorize the wrong Facebook account, just follow the simple instructions for changing accounts in the online help manual.

Authorizing a Twitter Account

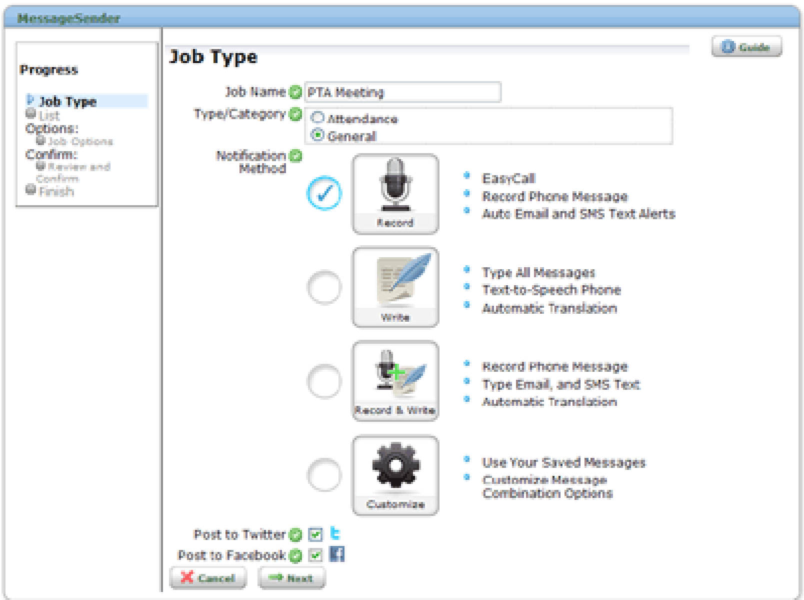
Authorizing a Twitter account is almost exactly the same as Facebook. The "Connect to Twitter" button is available at the Account link or as a step in MessageSender.

1. Make sure that you are either logged into the Twitter account you wish to authorize or are not logged into Twitter at all.
2. Click the "Connect to Twitter" button.

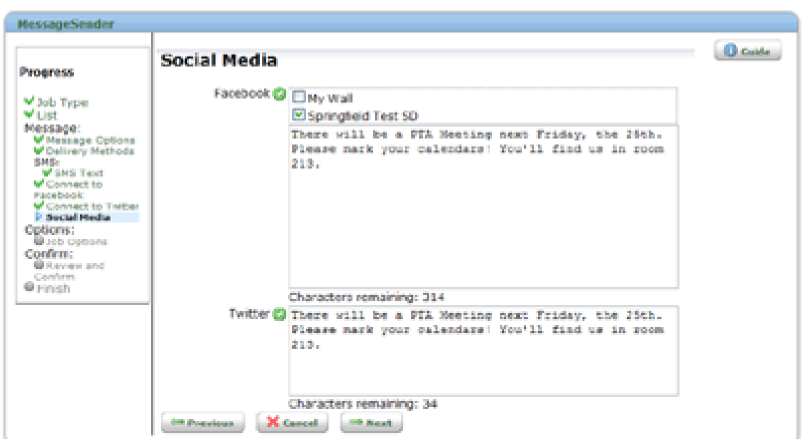
The only difference between Twitter and Facebook is that you will be redirected to a new web page to authorize Twitter. As soon as you're done, you will return to the page you were on in our system.

Posting to Facebook and Twitter

To access the social media posting options in MessageSender, simply check the Facebook and Twitter options at the bottom of the Job Type step, shown in the following image.



Then, are you're creating your messages, you will have a Social Media step. Simply type your Facebook and Twitter Posts into the appropriate fields, shown below, and click "Next".



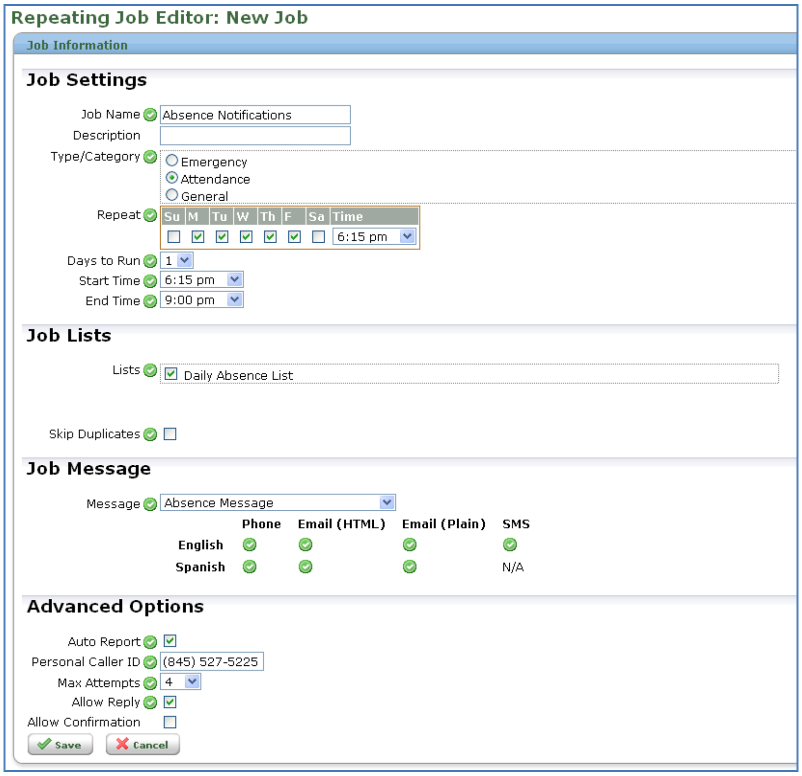
Creating a Repeating Job

In the above message example users typically would want to schedule a job such as an absence notification to run automatically each day without the need to manually create a new job each day. Such a job is referred to as a *Repeating Job*.

> *[<u>Important</u>: Never use Repeating Jobs for <u>one-time notifications</u>, such as Open House reminders, or Back-to-School Night.]*

1. To create a repeating job, first create your target list and your message group.
2. Next navigate to Notifications → Jobs and click *Create Repeating Job*. *[Note: This feature may not be available depending on the settings applied to your user account by your system administrator.]*

3. Enter a name for the job and select the job type.
4. Specify the days and times that the job should automatically launch. *[Important: Be sure that your data will upload in time to populate the list that the job will be using.]*
5. Select the list and message to use, and set any other relevant job options. Then click *Save*.



That's it! Your job will now run on each of the days and times you specified.

Using Telephone-only Access to Create and Initiate a Job

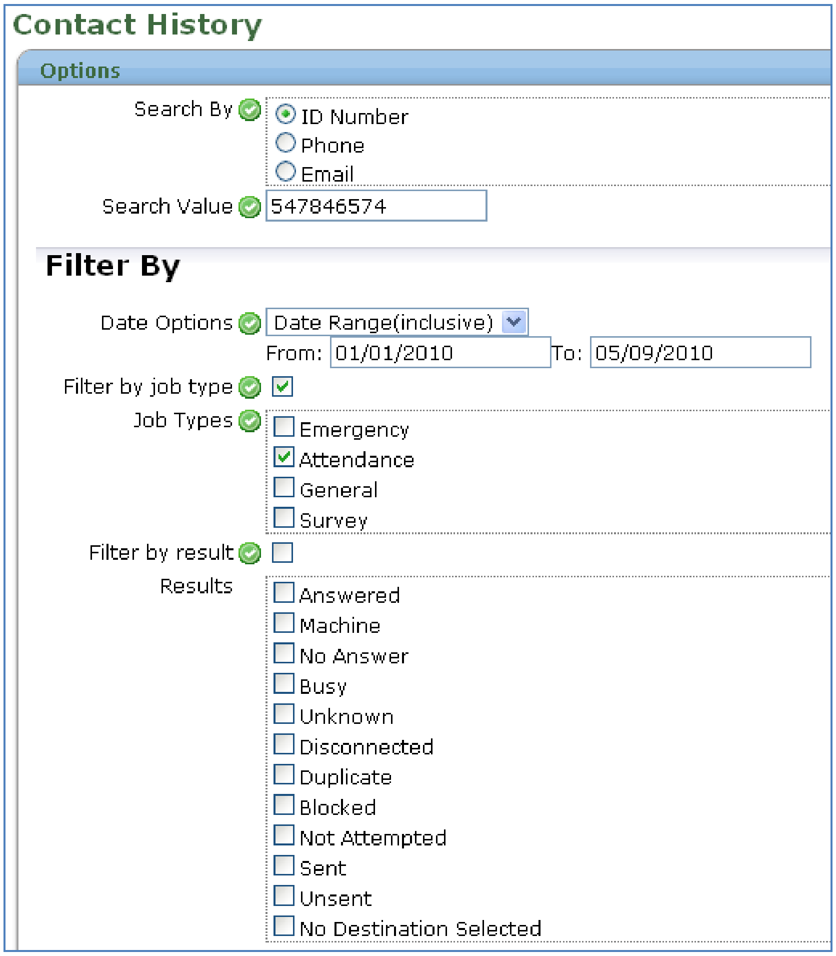
The *Telephone Remote Access* feature allows authorized users to record messages and create notification jobs without the need of a computer. These steps have been made into a printable pocket guide (see *Telephone Remote Access Pocket Guide* in Appendix A).

> *[Tip: Before calling into the system you will need your Telephone User ID# and Telephone PIN Code. These can be accessed and modified using the My Account button located in the top right corner of the window.]*

1. Dial the system phone number (If you don't know the system phone number you can view it by clicking the Account link in the upper right corner of your screen).
2. Just follow the prompts to record and save your message.
3. Press 1 to begin selecting options for this notification job. [Note: If you hang up at this point, your message will be saved and can be used in jobs created via the web interface.]
4. Select the list you want to call. Each list that you've previously created is read to you by the system. When you hear the list that you want to select simply press the number of that list.
5. Select the type of job you are sending. Each job type is read to you by the system. When you hear the job type that corresponds with your notification simply press that number. [Note: The "Emergency" job type should only be selected for notifications that fit the criteria set by your system administrator for an emergency notification.]
6. Select the maximum number of days you want to allow for your job to run. Remember that your job will only run during the call times that you set in the next step.
7. Review the default call time window for this job. Press 1 to accept the defaults or press 2 to modify the call time settings.
8. Listen to the confirmation menu to ensure that you selected all the correct options for your job.
9. When the confirmation message completes press 1 to submit your job, or follow the prompts to make any corrections. If you submit your job and then find that you need to make a change to it, you can modify or cancel the job using the web interface through your online account.

Creating an Individual Contact History Report

The following section demonstrates how to create a specific report for an individual, such as calls over a date range or calls to a particular phone number.



1. Click on the *Reports* tab, and then click the *Contact History* link.
2. Enter the search criteria for the report. You must enter at least one of the following: *ID#, phone number* or *email address*.
3. Enter optional filter criteria to narrow your search results.
4. When you have completed your selections click the *View Report* button to display the results.

For additional information on Reports, including saving and scheduling reports based on notification results (for example, a list of all of the *Disconnect* results for the last month) please visit online *Help* and click the *Reports* link in the *Contents* section on the Help menu.

Appendix A– Telephone Remote Access Pocket Guide

The *Telephone Remote Access Pocket Guide* is intended to serve as a quick reference that you can print and carry with you in order to allow you to initiate a call out in the event that you do not have access to a computer or the Internet.

> *[Important: It is recommended that you **DO NOT** write your **Telephone User ID#** and **Telephone PIN Code** on the pocket guide. Doing so would allow anyone who might come into possession of your pocket guide to initiate a callout to any list that you've created.]*

SchoolMessenger
Remote Telephone Access
Pocket Guide

1. **Dial** the system phone number:

2. Enter your **User ID** at the prompt and press pound (#).

3. Enter your **PIN code** and press pound (#).

4. **Press 1** to begin recording your default message.

5. **Press any button** to stop recording.

6. After you listen to your recording **press 1 to save** it in the system, press 2 to replay your message, or press 3 if you need to re-record your message.

7. **Press 2** to record your message in alternate languages or **press 1** to continue.

8. **Press 1** to begin selecting options to create a job for your message.

9. You will be given an option for each list currently saved on your account. Just **press the number of the list you want to use**.

10. **Select the number** that corresponds to the type of job you are sending.

11. **Select** the number of days you want to allow for your job.

12. To accept your default call time settings **press 1**. To change the call time settings **press 2** and follow the prompts.

13. Confirm that your job's information is correct and **press 1 to submit** your job or follow the prompts to make any corrections.

If you submit your job and then find that there was an error, you can cancel the job using the web interface.