SCHOOLMESSENGER™

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 application reviewed in the Getting Started training guide with information on additional features.

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.

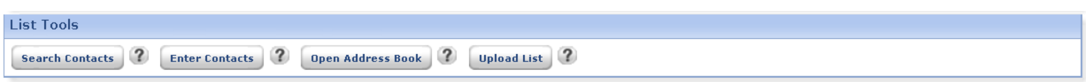
In Getting Started we review most of the features available from the Start Page. In this guide we will review features you will access by clicking on the **Notifications** and **Reports** tabs in the upper left section of your screen.

Notifications

When you click the Notifications tab you are taken directly to the List Builder screen. Here you will see the Create New List button; this functions exactly like the Create New List button available from your Start Page. 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.

Building lists with rules was covered in Getting Started. This guide will focus on those features available in the List Tools section. All steps begin from the List Editor screen; you are automatically redirected here once you have created and named a list.

List Tools

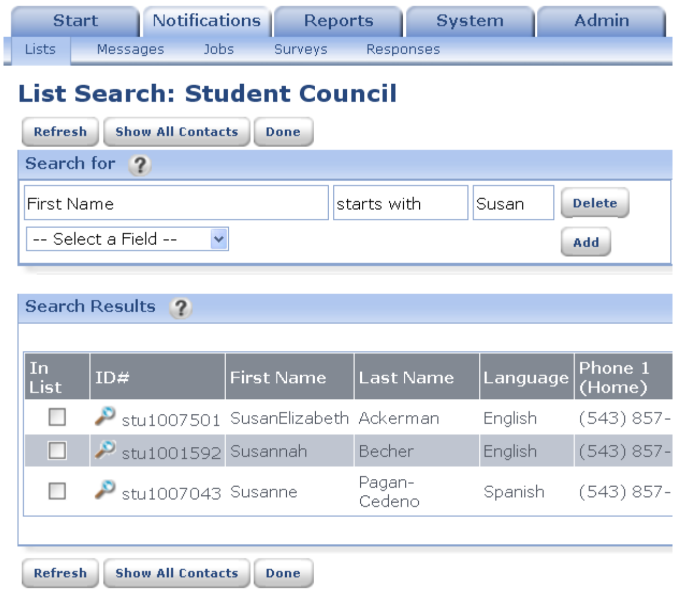


Search Contacts

You can use the Search Contacts button to create an *ad hoc* 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.

Click the **Search Contacts** button located on the left of the List Tools section. This will automatically redirect you to the List Search window.

To locate the individuals that you want to add to your list you may either click the Show All Contacts button to view all contact records that you have access to. If you choose this option, skip directly to Step 5 below. Alternately, you may filter your contacts in order to quickly locate certain individuals.

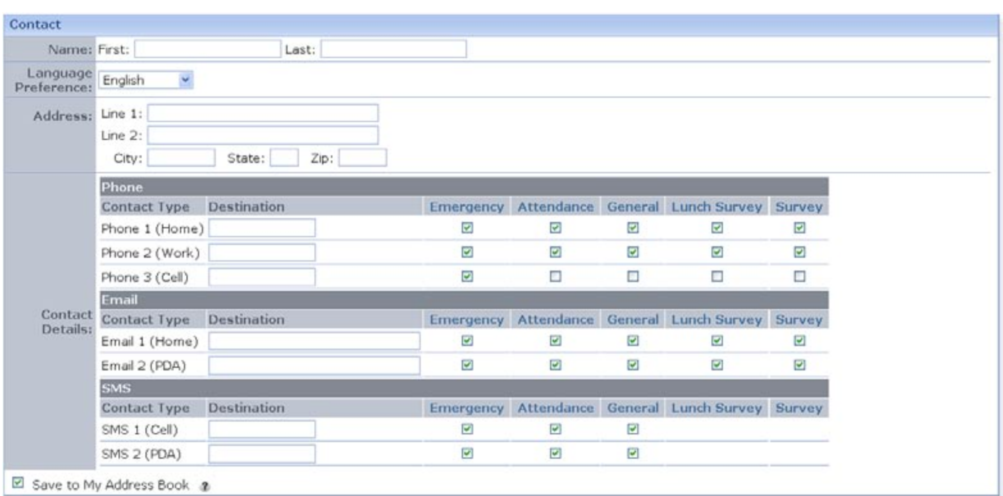


1. To filter your contacts, select the search field and the comparison operator you wish to use (i.e. "is", "is not", etc.) in the Search For area.
2. Select the data items that you wish to include in your search rule.
3. Click the Add button and repeat Steps 2 through 4 until all necessary rules are added.
4. When you locate individuals that 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.
5. When you are finished using the List Search window, click the Done button in the upper or lower left corner to return 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 and then click the *Refresh* button.]

Enter Contacts

The Enter Contacts button can be used to manually add individuals to your lists.



1. From the List Editor window, click the Enter Contacts button and then enter the individual's contact information into the appropriate fields. You may also choose how this person is contacted based on Notification Type by checking the appropriate boxes.
2. To automatically add the individual's contact information to your Address Book, make sure the Save to My Address Book option at the bottom of the window is checked. For more information on your Address Book see below.
3. If you have more than one person to add, click the Save & Add Another button which will bring this screen up again.
4. Click the Save button to add just this individual to your list.

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

Open Address Book

The Open Address Book button opens the list of contacts previously added using the Enter Contacts button, as long as the Save to My Address Book option was selected.

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

   [Note: Contacts from your Address Book can be added to this list by checking the boxes next to their names. You may Delete contacts or Edit a contact's information by using the links to the right. You may also add a contact to your Address Book by clicking the Add Contact 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	(987) 654-3210	harrisonf@gmail.com	(987) 537-0267		Edit | Delete
☐	Steve	Smith	English	(417) 291-6780	ssmith@springfieldsd.edu			Edit | Delete
☐	Donna	Thompson	English	(888) 547-7654	donnat@town.com	(888) 854-8236		Edit | Delete

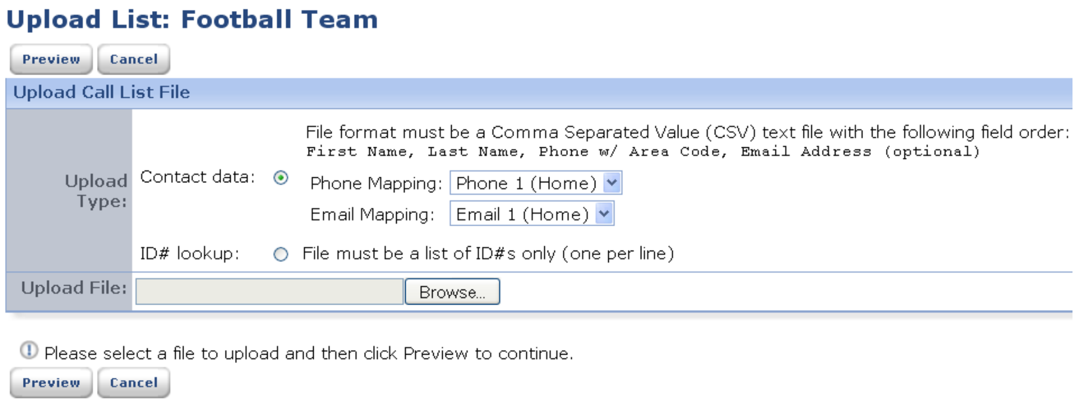
Done

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, or continue adding additional rules or individuals to your list.

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

Upload List

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



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 look for the recipient's information based on this number.

3. Click the Browse button to locate the file on your computer that you wish to upload.
4. From the dropdown 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 leave without saving your list, click the Cancel button.

For additional information on creating lists, please review the online Help section.

Messages

There are two types of phone messages you are allowed to create: Simple and Advanced.

Simple Phone Messages

In addition to **EasyCall** there are two basic options you can use to create a Simple Phone Message. You may either call into the system to record your message, or you can have the system call you to record.

[Reminder: The system cannot call you if you if it requires dialing an extension.]

Using Call Me to Record

1. Click Notifications → Messages
2. On the Message Builder window, click the Call Me to Record button. The Call Me pop-up window will open.

3. Enter a name for your message and the direct access phone number where you can be reached.
4. Click the Call Me to Record button. You will receive a call from the system momentarily. Just follow the prompts to record and save your message.
5. To record more than one message simply follow the prompts. You will have an opportunity to name all your recordings when you are finished.
6. After hanging up the phone, the recording window will change to the Rename Files window. Name your message(s) and then click the Save button.

> [Tip: If you are recording messages in an alternate language (e.g. Spanish), be sure to include the language in the name of your message for easy identification (e.g. "Open House Invitation – Spanish").]

7. Your message(s) will now appear in the My Phone Messages list and can be used in a Job

Calling in to Create a Simple Phone Message

Calling into the system to record your message is also an easy way to create a simple phone message. Appendix A is a Remote Access Pocket Guide of this information.

> [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 *Account* link located in the top right corner of the window. For more information on Account Settings see Appendix A from Getting Started.]

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. Your message(s) are now saved in your account on the Message Builder page and can be used when you create a Job.

> [Note: The system will generate names for your message(s) that include the date and time of your call. When you are finished recording your message(s), it's a good idea to rename them using your online user account to something that is easier to identify. You will find your newly created message(s) on the *Message Builder* page located under the *Notifications* tab.]

Advanced Phone Messages

Advanced phone messages use advanced options or dynamic data fields. The most common use for an advanced message is to personalize the content with dynamic data elements, however not all advanced messages are dynamic. You can also type your phone message into the Phone Message Editor and have a text-to-speech voice read it to each recipient. This feature is available for text written in multiple languages.

For additional information on creating messages, please review the online Help section. This also includes steps to import audio files as well as construct messages using spoken voice recordings with dynamic data spoken with text-to-speech.

Email Messages

From Notifications → Messages you will see the My Email Messages section of the Messages Builder page which allows you to create and edit email messages. To create a new email message, click the Create Email Message button. This will take you to the Email Message Editor window. If you plan to create this message in an alternate language be sure to indicate the language in the message name for easy identification when you create your notification job.

1. Enter a subject in the Subject field. This is what the recipient will see as the subject line of the email.
2. Enter the name of the sender in the From Name field. This is who the recipient will see as the sender (typically this will be your name).
3. Enter the sender's email address in the From Email field. This is the sender's email address as seen by the recipient. Keep in mind that recipients will see – possibly respond to – this address; it will also receive all of the "invalid address" response emails.

   [Important: You must use a valid domain name for the From Email field.]

4. Enter the body of the email message in the Body field. You may use carriage returns for formatting.
5. Click the Save button at the top or bottom of the window when you are done. Your email message will be saved, and you will be returned to the Message Builder window.
6. Your email message is now ready to use in a notification job.

Using Data Fields in Your Messages

Both phone and email messages can include dynamic data elements. These can be inserted at any point in the message. This is especially useful when creating messages that require unique information for each recipient – such as an absence message.

Below is an example of what the text of an absence message might appear like:

> *"Hello. This is a message from Mrs. Jones, the attendance clerk at Sunset Junior High School. I am contacting you to let you know that your student, <<First Name>> <<Last Name>>, was marked absent from school <<Absence Date>>. Please remember to send a signed note when they return giving the reason for the absence. If you have any questions please call me at 623-9600 extension 214."*

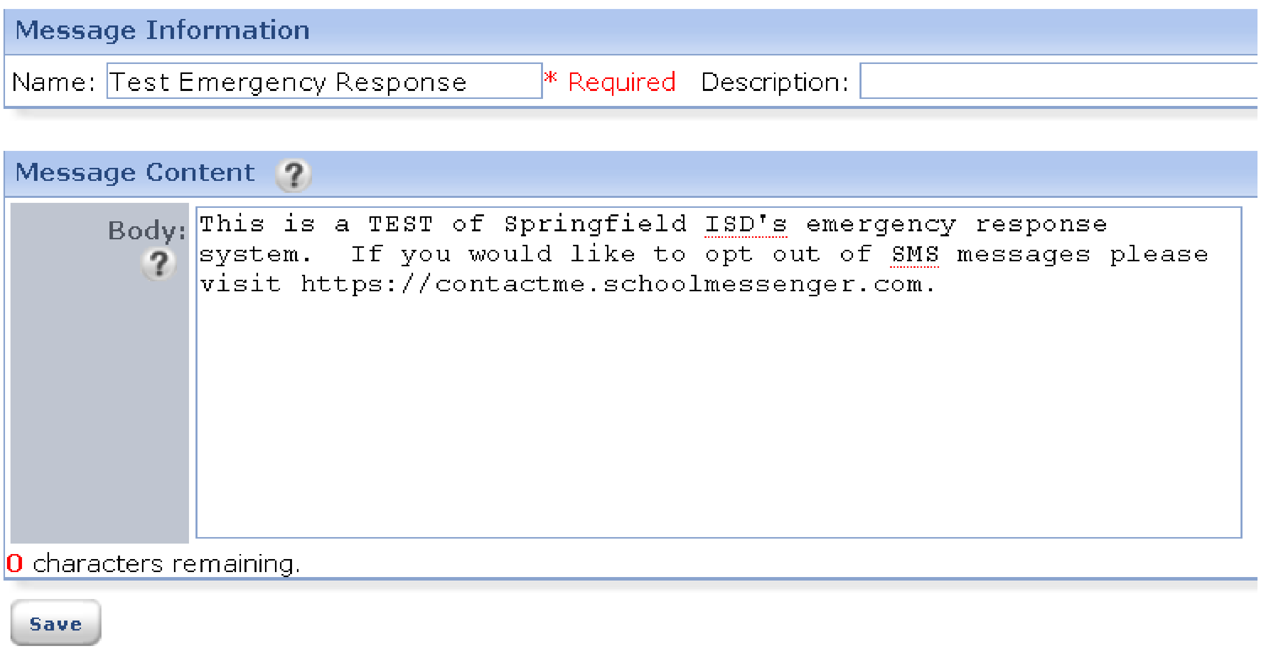
The inserted data fields appear double bracketed, <<like so>>. It is very important that the dynamic text not be edited. Altering the dynamic text may cause it to not play correctly.

> [Note: For detailed instructions on creating dynamic messages and a list of file types may not be attached to email messages see Creating an Email Message in the online help.]

SMS Messages

From Notifications → Messages you will see the My SMS Messages section of the Messages Builder page which allows you to create and edit text messages to mobile devices. To create a new text message:

1. Click the Create SMS Message button. This will take you to the Email Message Editor window.



2. Type the content you wish to send in the Body section under Message Content. SMS Messages must not exceed 160 characters in length. The counter at the bottom of the SMS Message Editor, shown above, can help you ensure that your message fits within the size restraints.

When you have finished entering your message, click the Save button to return to the Message Builder.

For additional information on Messages, including Survey Templates, please review online Help.

Jobs

Create New Job

The Create New Job button under Notifications → Jobs functions exactly like the Create New Job button available from your Start Page. Job and Message Options are reviewed in the Getting Started Training Guide and online Help. This guide will cover creating messages from the Job Editor Screen text-to-speech, email and SMS options. This also includes information on automatic translation for text-to-speech and email messages.

Create a text-to-speech message:

Select this option if you would like to type a simple message for the job. You may also automatically translate your message into different languages using this option. To automatically translate your text-to-speech message into other languages:

1. Type the content of your message in empty box in the Phone section
2. To automatically translate your voice message into other languages:
3. Click checkbox Automatically translate to other languages
4. Click the Show Translations button to view the message translated into any language enabled on your account.

5. To listen to the translated message, click the Play button.
6. To view the entire translated message, click the Show message.
7. If there is an error or something you would like to add to your translation, click the Override Translation checkbox while viewing the entire translated message. This will lock the message so it won't change with the original English message.
8. You may also re-translate the message back to English by clicking the Refresh link in the Retranslate section.

Create a message (under the Email section):

Select this option if you would like to type a simple message for the job. You may also automatically translate your message into different languages using this option.

1. Type the content of your message into the empty box in the Email section
2. To automatically translate your email message into other languages
3. Click the checkbox for automatic translation.
4. Click the Show Translations button to view the message translated into any language enabled on your account.

5. To view the entire translated message, click the Show message.
6. If there is an error or something you would like to add to your translation, click the Override Translation checkbox while viewing the entire translated message. This will lock the message so it won't change with the original English message.
7. You may also re-translate the message back to English by clicking the Refresh link in the Retranslate section.

Translation Disclaimer: *Translations are made through an automated/computerized process powered by Google Translate. Reliance Communications Inc. strives to achieve the highest possible accuracy, however no automated translation is perfect nor is it intended to replace human translators. Users should note that the quality of the input significantly affects the translations. Reliance Communications Inc. does not warrant the accuracy, reliability, or timeliness of any information translated by this system and shall not be liable for any losses caused by such reliance on the accuracy, reliability, or timeliness of such information. While every effort is made to ensure the accuracy of the translation, portions may be incorrect. Any person or entity who relies on information obtained from the system does so at his or her own risk.*

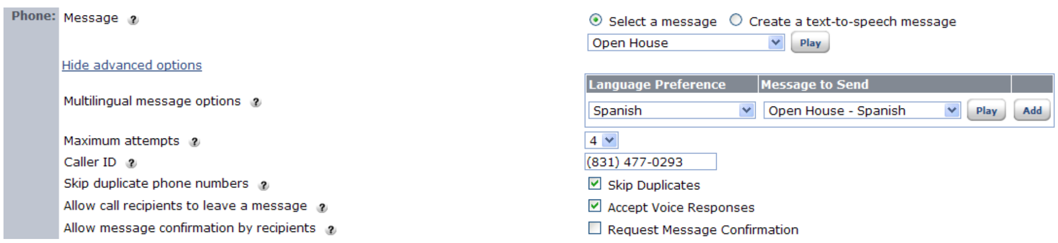
Create a message (under the SMS section):

Select this option if you would like to type a text message for the job.

Type the content of your message into the empty box in the SMS section. SMS Messages must not exceed 160 characters in length. The counter, to the right, can help you ensure that your message fits within the size restraints.

Configuring a Multilingual Job:

This section assumes that you have already created your message in two languages (ie. English and Spanish) and that the messages are under Notifications → Messages section of your account. This is how you will set up a multilingual notification when the district wishes to use real voice recordings or text-to-speech messages that include dynamic data elements.



1. Configure your general message settings (Phone, Email, and SMS, etc.)
2. Set your default message. This is the message everyone will receive if they have not requested another language; typically English.
3. Click Advanced Options in to reveal the multilingual message feature.
4. In the Multilingual Message Options select the recipient's language preference in the left drop down menu and then select the name of the message for that language in the Message to Send drop down menu.
5. Click the Add button to set the language option.
6. Continue repeating steps 4 and 5 until you have finished adding language options.
7. When you have finished configuring your job and are ready to send it, click the Proceed to Confirmation button. If everything looks correct, click the Submit Job button. If you need to make a change, just click the Modify Job Settings button. If you would like to wait to send your job at a later time, click the Save For Later button.

Example of a Multilingual Job:

You wish to send out a general announcement by phone and you've recorded two versions of your message - one in English and one in Spanish. The goal is to get the Spanish message to the recipients who have requested Spanish as their language preference. English is the most common language in your school.

The default message in this instance would be set to the English version. In the Multilingual Message Options, Spanish would be set for the language preference and the Spanish version of the message would be the Message to Send.

Online Help contains the list of languages available for translation for both phone and email messages.

> [Note: This guide covers how to create a job that will only run once. If you need to create a repeating job (e.g. a daily absence notification job), please refer to the *Repeating Jobs* section in the online help.]

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 or Internet access. These steps have been made portable, *Telephone Remote Access Pocket Guide* in Appendix A.

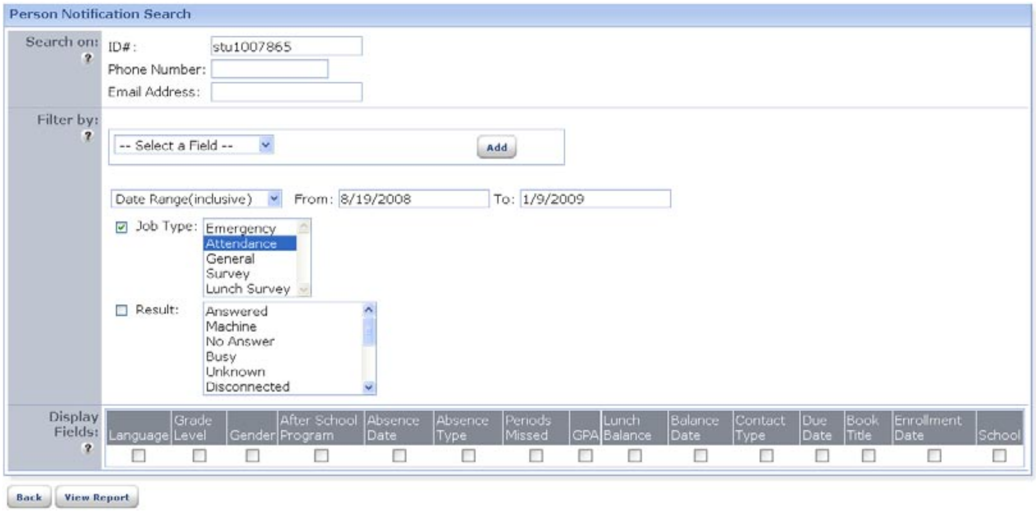
> [Tip: Before calling into the system you will need your *Telephone User ID#* and *Telephone PIN Code*. These can be accessed and modified using the *My Account* button located in the top right corner of the window.]

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.

Reports

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.