SchoolMessenger New User Training Guide

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Getting Started

Welcome!

Welcome to SchoolMessenger ASP Plus. This guide will help you learn your way around the system so that you can easily and quickly get your message out by phone or email to hundreds or even thousands of people.

There are three basic steps to creating any type of notification job in the system:

- **Make a List** - For every notification job, you must have a list of people whom you wish to receive your message. Your list can be static or dynamic (automatically updated every time it is used). Your lists can always be saved and easily reused.

- **Create a Message** - Every notification job must also have a message. The system contains tools to quickly create messages for every type of job. Messages, like lists, can be either static or dynamic. They also can always be saved and easily reused.

- **Create a Job** - A Job is a scheduled task specifying which message gets sent to which list at any given time. Jobs can be created that will send messages via phone, email, and print or any combination of mediums. They can be set to happen only once or to repeat on certain days.

Many of these steps can be accessed from your Start Page or by Remote Telephone Access, if your system administrator has enabled these features on your account.

Help

SchoolMessenger ASP Plus contains thorough and easy to use online help. Topics are organized within the table of contents in such a way as to make finding what you need to know as easy as possible. Within each topic you may find links to other relevant topics as well as step-by-step help to get your task done.

In addition to the online help, you will find lots of on-the-spot help within the system. Whenever you see this icon:  just mouse over for Hover Help. Hover Help will display a small message with more information about the object it appears next to. If you need even more information, just click on the Hover Help icon to be taken to the relevant page in this Help Guidethe online help.

The Start Page

Important: *Only those features that you have been granted access to will display. For access to additional features contact your system administrator.*

Many of the most important tools in the system can be accessed from your Start Page if your system administrator has enabled these features on your account. The image below shows a sample Start Page.

Recent Jobs

The Recent Jobs section of the Start dashboard displays a list of your most recent active, pending, and completed jobs. Active and pending jobs may be viewed and edited, and the jobs themselves may be canceled from this area if desired. Simply clicking the Report link next to the job name allows you to access the results of recently completed jobs. The Graph link will open a small window that displays the results of the job as a graph.

EasyCall

The EasyCall button located in the Shortcuts section provides a quick access tool for launching a basic phone notification. EasyCall lets you simply select an existing list to call, enter the direct dial phone number where you can be reached in order to record the message, and with a few simple clicks a call will be sent to tens, hundreds, or even thousands of recipients.

My Active Calls

When there is an active job in the system, the delivery results can be easily viewed in the pie chart displayed here. Refreshing the page will display the most current information.

Creating a List

Creating a New List

One of the first steps to successfully sending out a call, print, or email job is to create a list of the people who are to receive your message.

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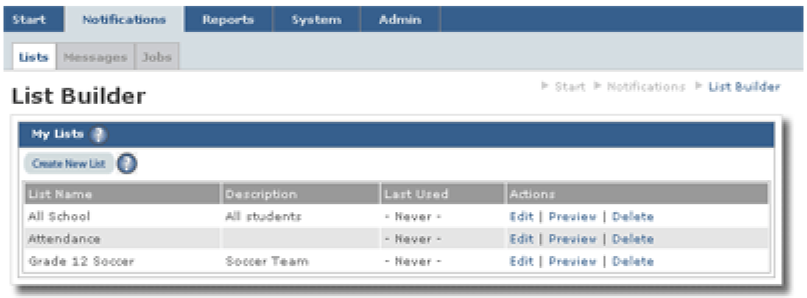


To Add a New List

1. Click the Notifications Tab followed by the Lists subtab to enter the List Builder screen.

2. Click the Create New List button.

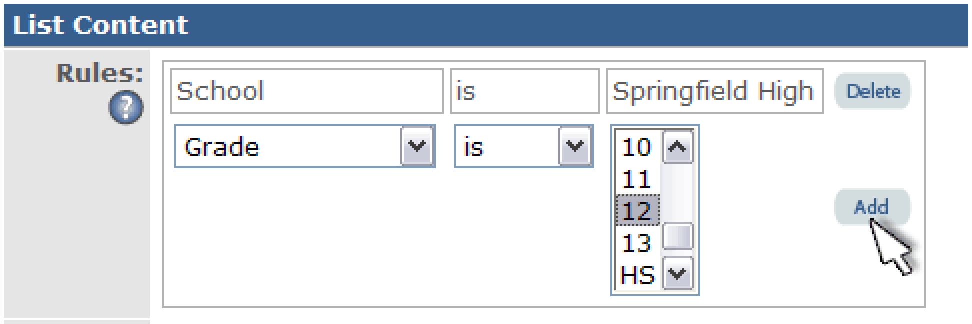
3. Enter a name and description for your list.

4. Click the Save button.

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

Adding People Using Rules

One of the easiest ways to add a group of people to your list is by defining rules. Lists based on rules are perfect for situations where a large number of people meeting certain criteria must be contacted. For example, the image below shows a list being created containing all of the 12th grade students at Springfield High School.



To Add Rules To Your List:

1. In the List Editor screen, select the field that you wish to filter by.
2. Select the comparison operator you wish to use (i.e. "is", "is not", etc.).
3. Select the data items that you wish to include in your rule. You can select multiple items by holding the Ctrl key (command key on the Mac) while clicking.
4. Click the Add button and repeat steps 1 through 4 until all necessary rules are added.
5. Click the Preview button in the upper or lower left corner to preview your list.
6. When you are finished previewing click the Done button in the upper or lower left corners.
7. If your list is complete, click the Save button, also found in the upper or lower left corners, to save your list. Or you can continue to add individuals using a different method.

To Delete a Rule:

Simply click the Delete button located to the right of the rule.

Adding People Manually

Lists can be created by manually entering an individual's contact information in the Manual Add fields on the List Editor screen. Manually adding individuals can be used alone or in conjunction with any of the other list building methods. Once an individual is manually added his/her information will appear in the Additions section of the List Editor screen.

The image below shows a list being manually created. There are two people who have already been added displayed in the Additions section and another being added in the Manual Add fields.

To Manually Add Individuals To Your List:

1. In the List Editor screen, enter the individual's contact information into the Manual Add fields.

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 screen is checked.

3. Click the Add button in the lower right corner to add the individual to your list.

4. Repeat as necessary.

5. When your list is complete, click the Save button, located in the upper or lower left corners to save your list, or continue to add individuals using a different method.

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 screen.

Adding People From Your Address Book

You may store your own private list of contacts in your Address Book that can be easily added to your list without the need to manually retype the contact information.

Adding Contacts From Your Address Book to Your List:

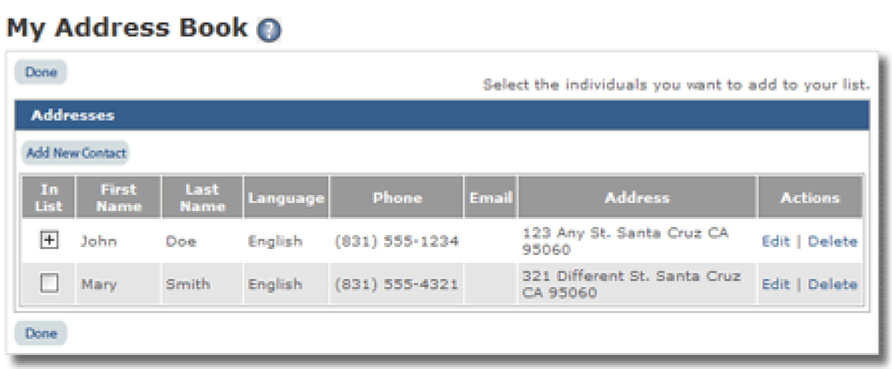
1. While in the List Editor screen open your Address Book by clicking on the Open Address Book button.

2. Contacts from your Address book can be added by checking the boxes next to their names.

3. After selecting the contacts you wish to add, finish by clicking the Done button.

4. If your list is complete, click Save. Otherwise you can continue to add people using any of the other list building methods.

The image below shows a sample Address Book in which only one person is being added to the list.



Adding People By Searching

You may search the database for individuals to add to your lists by clicking the Search button located in the top left corner of the List Editor screen. This will open the List Search screen. Here you can create rules that match your search criteria and select individuals from the search to add to your list. The images below will help explain how to use the List Search screen.

Using the List Search Screen:

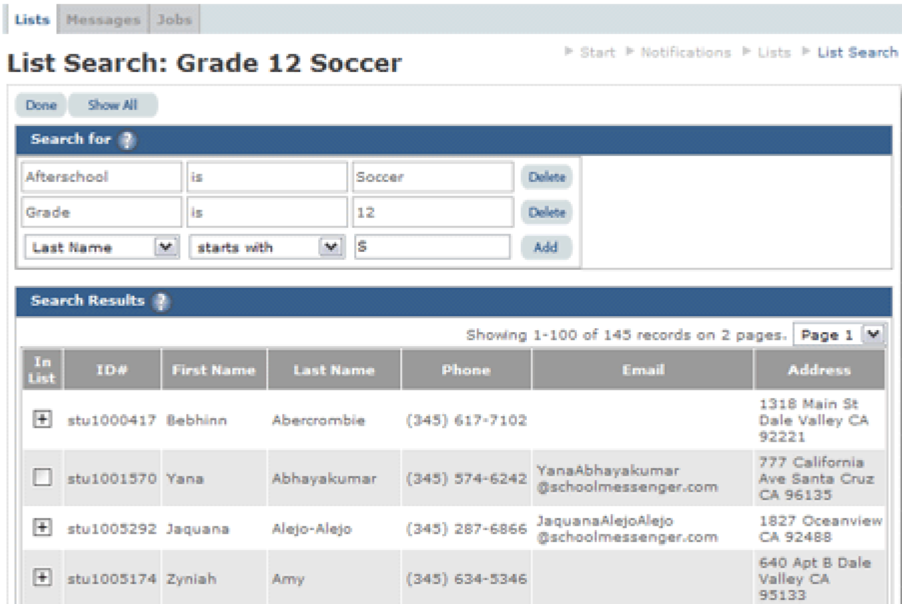
1. Click the Search button in the upper left corner of the List Editor screen to access the List Search screen shown above.

2. Select the comparison operator you wish to use (i.e. "is", "is not", etc.) in the Search For area as shown in the image below.

3. Select the data items that you wish to include in your rule.

4. Click the Add button and repeat steps 2 through 4 until all necessary rules are added.

5. When you are finished using the List Search screen, click the Done button in the upper or lower left corners to return to the List Editor screen where you can save your list or continue to add individuals using any of the other list building methods.



To Remove Individuals From Your Search Based List:

Simply uncheck the box next to the individual's name in the Search Results.

Remote Telephone Access

Remotely Create a Single Language Job

1. Dial the system phone number. Enter your telephone user ID at the prompt and press pound (#).
2. Enter your PIN code and press pound (#).
3. Press 1 to begin recording your message.
4. Press any button to stop recording.
5. After you listen to your recording press 1 to save it in the system. Press 3 if you need to re-record your message.
6. Press 1 to continue and skip the multilingual message option.
7. Press 1 to begin selecting options to create a job for your message. If you hang up at this point, your message will be saved and can be used in jobs created via the web interface.
8. 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.
9. Press 1 to confirm your list selection. If you need to select a different list press 2.
10. Press 1 to send your job using your highest authorized priority level or press 2 to use your default priority level.
11. Select the number of days you want to allow for your job. It is important to make sure to allow the system enough time to call everybody in your list. For a large call out with several thousand people, your system may need a few days to complete the job. Remember that your job will only run during the default calling times set for your account which can affect the number of people you can call each day.
12. 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 modify or cancel the job using the web interface.

Creating a Job with EasyCall

Note: In order to use EasyCall, you must have a list already saved in the system.

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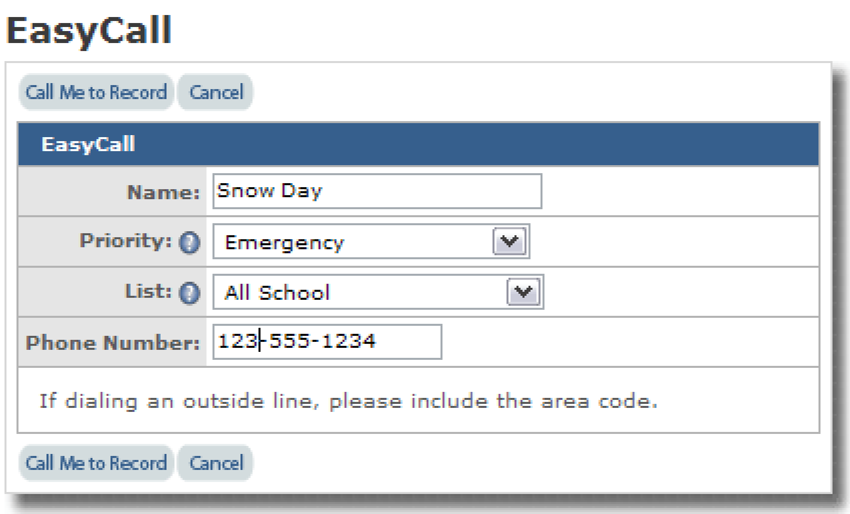
The EasyCall feature can be found on your Start Page. To create a new EasyCall job, just click the EasyCall button.

After you click the Easy Call button the EasyCall window will pop up.



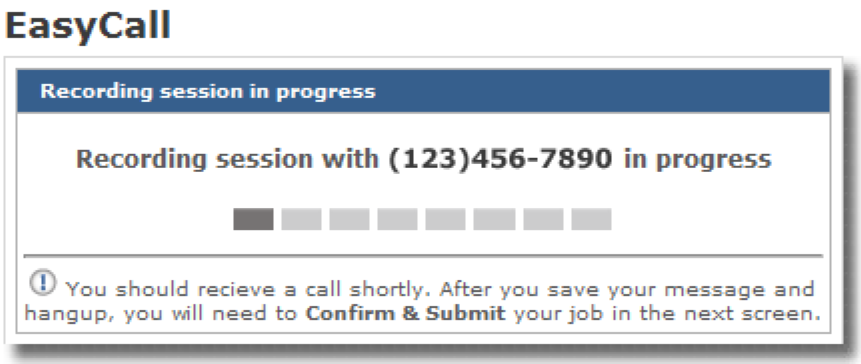
Using EasyCall:

1. Select the job's priority. This determines the priority by which the job will be processed relative to other jobs in the system. For example, an Emergency job would run before an Attendance job. If the Attendance job is currently running, it will be paused to run the Emergency job.

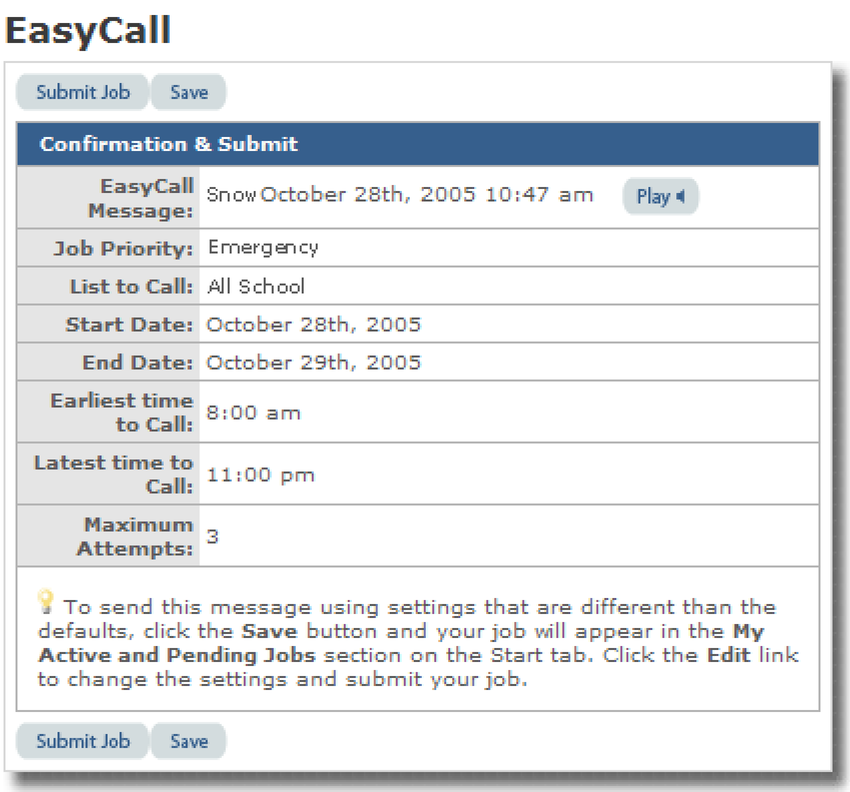
2. Select your list.

3. Enter the direct access phone number where you are located (the system cannot call extensions).

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



5. When the system calls you say, "Hello" so the system knows you're ready. Then just follow the prompts to complete your recording. After you finish and hang up, you will see the following screen.



6. Here you may confirm that your message sounds correct and submit your job by clicking the Submit Job button.

Creating a Message

Creating a Simple Phone Message

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Phone messages can be **simple** (an unchanging message) or **advanced** (using data fields to personalize your message). The following sections will outline the methods you can use to create a simple phone message. If you need learn more about creating an advanced phone message please read the help topic, Creating an Advanced Phone Message.

There are two options to create a simple phone message. You may either call in to record your message or have the system call you at your direct access phone number.

Using Remote Access to Create a Message

Calling in to record your message is a very easy way to create a simple message. It's also easy to record your message in different languages using this method.

1. Dial the system phone number. Enter your four digit user ID at the prompt and press pound (#).
2. Enter your PIN code and press pound (#).
3. Press 1 to begin recording your message.
4. Press any button to stop recording.
5. After you listen to your recording press 1 to save it in the system, 2 if you need to hear it again, or press 3 if you need to re-record your message.
6. Press 2 if you need to record your message in other languages or press 1 to continue.
7. Hang up. Your message will be saved and can be used in jobs created with your online user account.

Note: The system will generate names for your messages that include the date and time of your call. When you are finished recording your messages, it is a good idea to edit the names of your new messages to something that is easier to identify using your online user account.

Call Me to Record

This is another easy way to create a simple message. To record your message in different languages, you will need to have the system call you once for each language.

1. Click the Call Me to Record button on the Message Builder page.

2. Enter a name for your new message and the direct access phone number where you can be reached.

3. Click Call Me to Record.

You will receive a call from the system momentarily. Just say, "Hello" so the system knows you're ready and then follow the prompts to record your message. When you are done, your new message will appear in the My Phone Messages list on the Message Builder page.

Creating a Notification Job

Creating a New Job

Before attempting to create a new job, make sure that you have created a list and a message to send. This section covers how to create a job that will only run once. If you need to create a repeating job, please read the Repeating Jobs section in the online help.

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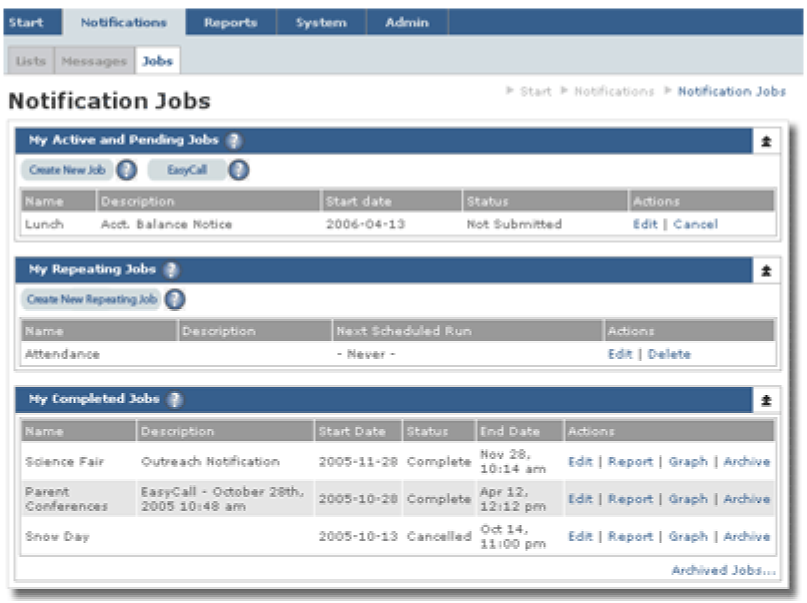
To Create a New Notification Job:



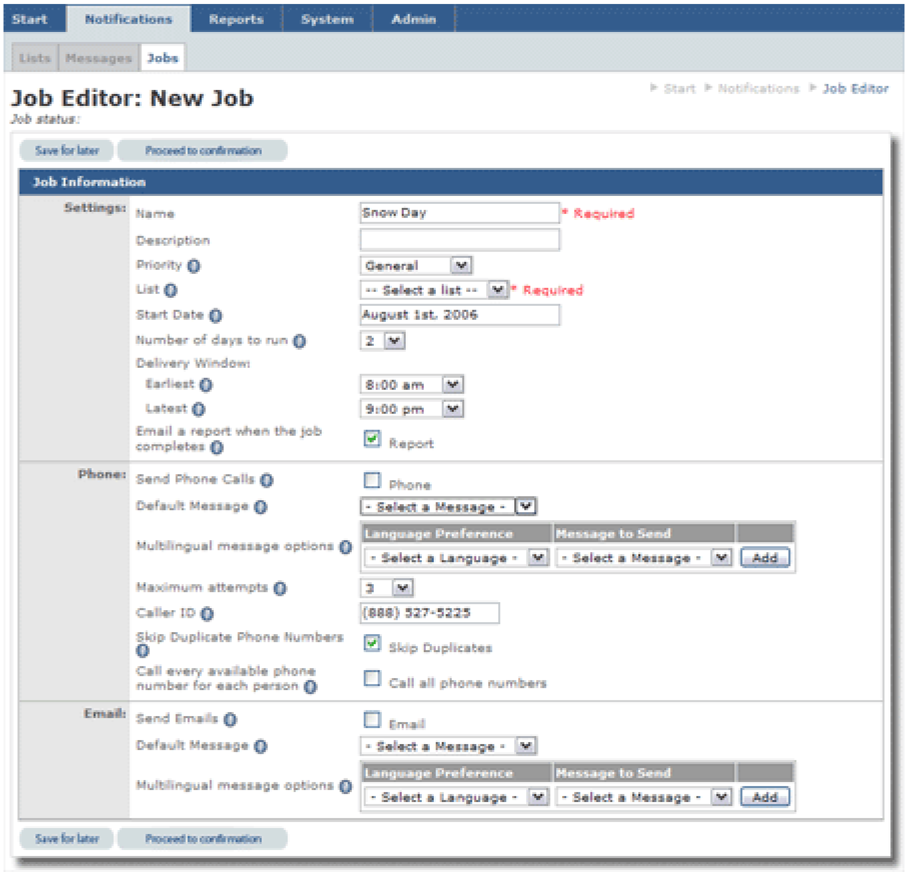
1. Click the Notifications Tab followed by the Jobs subtab to enter the Notification Jobs screen.

2. Click the Create New Job button which will take you to the Job Editor screen shown below.

3. Enter a brief name and description for your job.

Note: To create a repeating job, such as a daily absence notification, see the section on Repeating Jobs in the online help.

The Job Editor



There are four major components to the Job Editor screen. They are:

Settings:

- Name: This field shows the name of the job you are about to send.
- Description: Here you can add an optional description for your job.
- Priority: With this drop down menu you can select the priority of your job. Higher priority jobs will be run first.
- List: Use this drop down menu to choose which saved list you wish to send your message to.
- Start Date: This field allows you to set the date your job will begin to run on. By default it contains the current date.
- Delivery Window: This section establishes the times when the system will call 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 specified in your user account.

Phone:

- Send Phone Calls: Check this box if you wish to send phone calls as part of this notification. It will also automatically set if you begin to configure other settings in the Phone section.
- Default Message: This is the message that will be sent by default.
- Multilingual Phone Message Options: Use these menus to set up a multilingual message.
- Maximum attempts: Use this drop down menu to select how many times the system should try to call each recipient.
- 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. For example, if you were calling every student in your school with a general announcement, you might want to skip duplicate numbers. Then 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.
- Call every available phone number for each person: Checking this box will cause the system to attempt to reach your recipients at every available phone number in the system. For example, if the database contained a home, work, and cell phone number all of them would receive a call.

Email:

- Send Emails: Check this box if you wish to send emails as part of this notification. It will also automatically set if you begin to configure other settings in the Email section.
- Default Message: Use the drop down menu to select the message that will be sent by default.
- Multilingual Email Message Options: Use these menus to set up a multilingual message.

Configuring a Multilingual Job:

This section assumes that you have already created your message in two languages (ie. English and Spanish).

1. Configure your general message settings (Phone, Email, and/or Print, time to call, etc.)

2. Set your default message. This is the message everyone will receive if they have not requested another language.

3. 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.

4. Click the Add button to set the language option.

For example:

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.

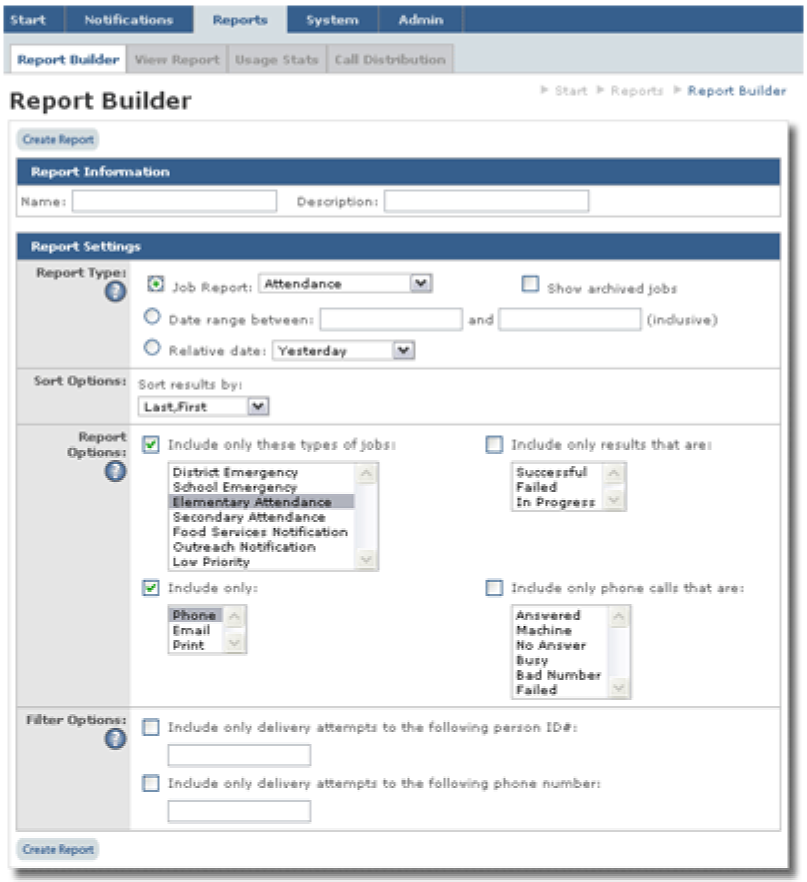
Review and Confirm:

When you have finished configuring your job and are ready to send it, click the Proceed to Confirmation button. You will see a screen like the one below. If everything looks correct, click the Submit Job button. If you need to make a change, just click the back button in your browser.

Reports

Creating Notification Reports

A Notification Report is easy to create and shows you how successfully your message was delivered.



To Create a Notification Report:

1. Click on the Reports tab. This will take you to the Report Builder screen.
2. Enter a brief name and description for this report.
3. In the Report Type area select the type of report you wish to generate. Reports can be based on relative date, a particular job, or for a date range.
4. In the Sort Options section, choose the method you would like your data to be sorted by.

5. In the Report Options section, you can select the parameters of the report. For example, the report for the image above would include every Elementary Attendance job sent by phone.

6. If you wish to limit the results to a particular individual enter the person's ID # in the filter options field located at the bottom of the window.

7. When you have completed your selections click the Create Report button to display the results.