SchoolMessenger™

Advanced Training

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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 reviewed 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.

Editing Lists

When you click the **Notifications** tab you are taken directly to the **List Builder** screen. Here you will see the **Create New 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.

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 New List** button to start a new list.

Additional List Tools

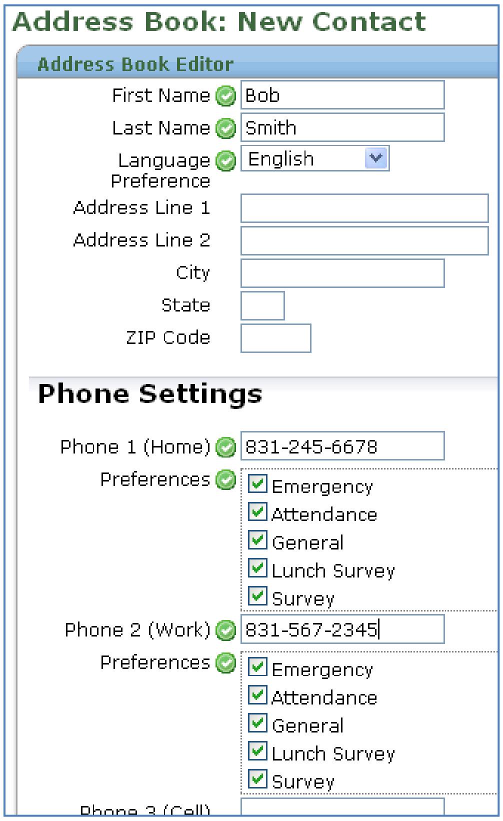
Additional List Tools

Tool	Description
Enter Contacts	Manually type in new contacts
Open Address Book	Choose from contacts you manually typed into your personal address book
Search Contacts	Search the shared system contact database
Upload List	Upload a list of contacts using a CSV file

Enter Contacts

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

1. Type a name for your new list. Then 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.

[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.

1. Open your Address Book by clicking on the **Open Address Book** button located in the Additional 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.]

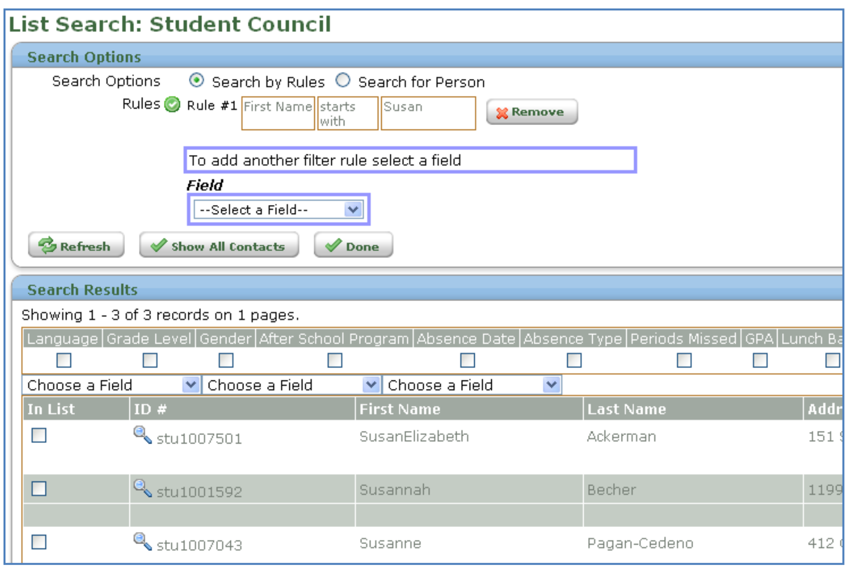
2. After selecting the contacts you wish to add, finish by clicking the **Done** button.
3. If your list is complete, click the **Done** button to save your changes, or continue adding additional rules or individuals to this list.

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

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.

1. Click the **Search Contacts** button located on the left of the **Additional List Tools** section. This will redirect you to the **Search Options** window.
2. To locate the individuals that you want to add to your list you can either click the **Show All Contacts** button to view all contact records that you have access to, or use a rule or other search criteria to narrow your search.

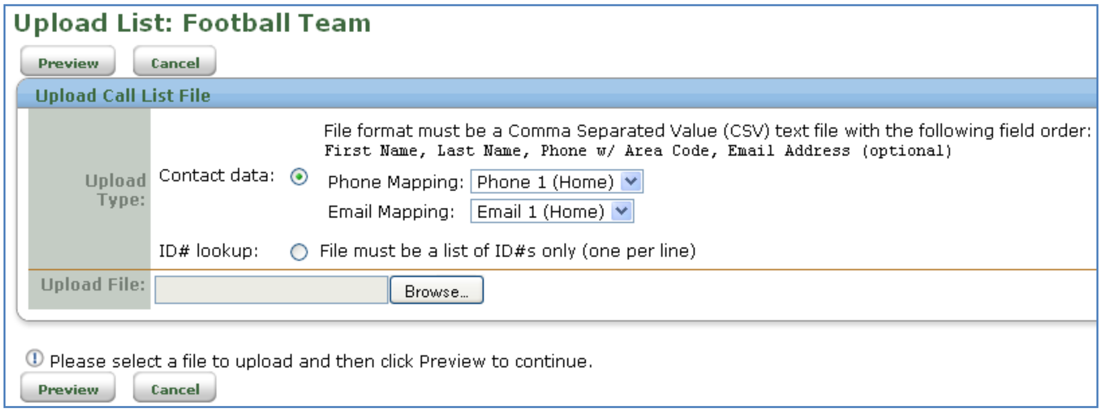


3. To filter your contacts by rules, select the search field and the comparison operator you wish to use (i.e. “is", "is not", etc.) in the **Search For** area. Then select the data items that you wish to include in your search rule, and click the Add button.
4. When you locate the person (or people) 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 at the bottom of the 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.]

Upload List

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 leave without saving your list, click the **Cancel** button.

Messages

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

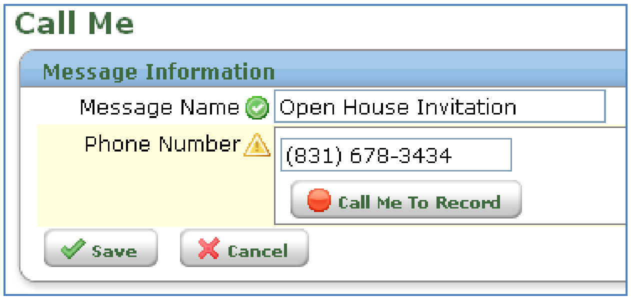
Simple Phone Messages

A **Simple Phone Message** is a message that is the same for all recipients. There are two 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 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. After hanging up the phone you will see a **Completed!** message. Click the **Save** button to save your recording and return to the **Message Builder**.
6. Your message will now appear in the **My Phone Messages** list and can be used in a job.
7. To record more than one message simply repeat the above steps.

[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").]

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 inbound 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. 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.

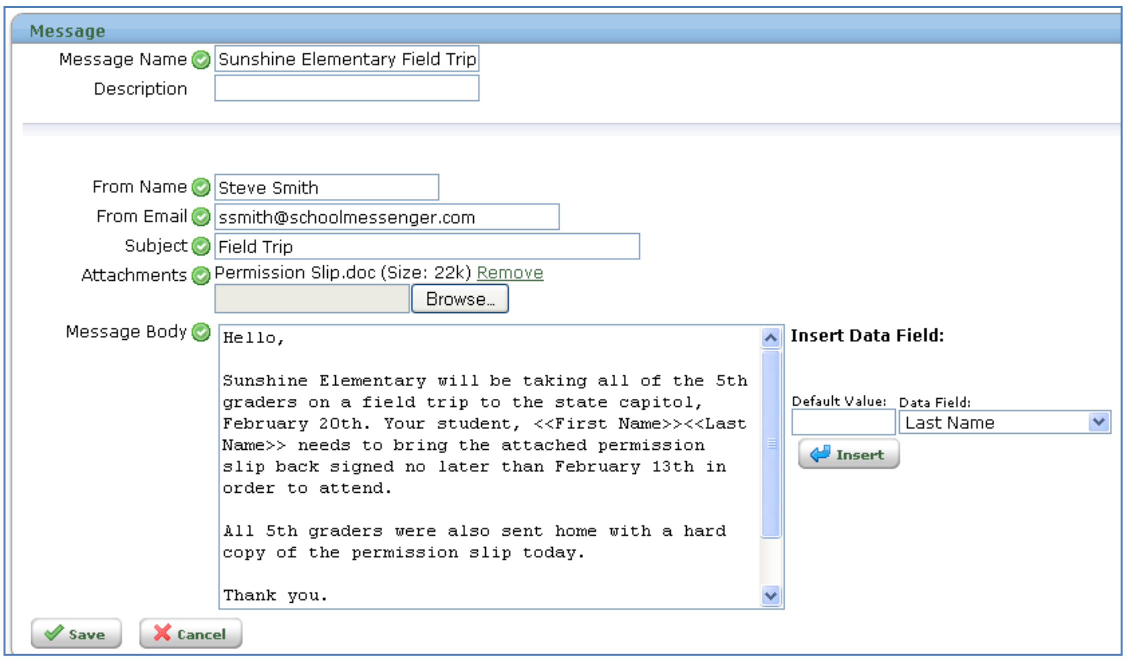
[Note: The system will generate names for your message(s) that include the date and time of your call. When you are finished recording your message(s), it's a good idea to rename them using your online user account to something that is easier to identify. You will find your newly created message(s) on 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 also available for text written in multiple languages.

Email Messages

1. On the Notifications → Messages tab 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.



2. Enter a subject in the **Subject** field. This is what the recipient will see as the subject line of the email.
3. 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).
4. 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 your account email domain name in the **From Email** field.]*

5. Enter the body of the email message in the **Message Body** field. You may use carriage returns for formatting.

6. Click the **Save** button at the bottom of the window when you are done. Your email message will be saved, and you will be returned to the **Message Builder** window.
7. 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/display correctly.

SMS Messages

From the Notifications → Messages tab you will see the **My SMS Messages** section of the **Message Builder** page which allows you to create and edit SMS text messages to send 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. Enter a **Message Name**.
3. Type the content you wish to send in the **SMS Message** section. 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.

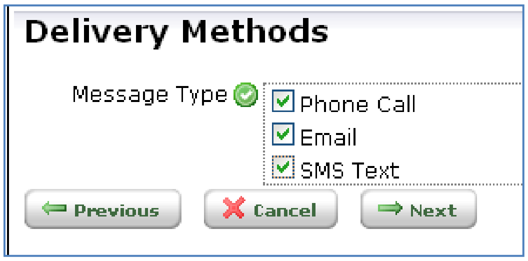
4. When you have finished entering your message, click the **Save** button to return to the **Message Builder**.

Jobs

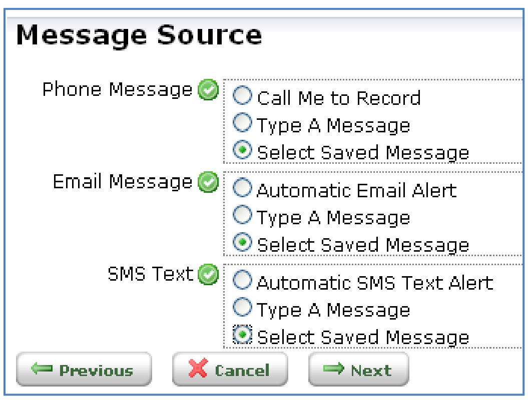
Using Your Messages in a Job

To create a job using the messages you just made, use the EasyStart button, and select the Customize option.

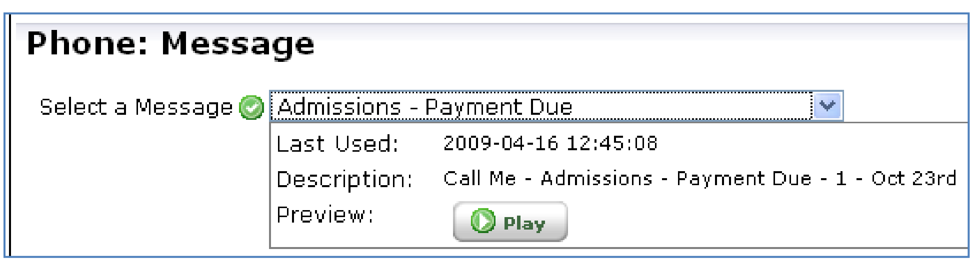
1. On the Delivery Methods page, select what message types to include.



2. On the **Message Source** page use the **Select a Saved Message** option.



3. For each message type selected, choose the appropriate message to send.



4. **Confirm** and **submit** your notification as you normally would.

Configuring a Multilingual Job

Suppose 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 – and the message contains unique data elements (for example, the student's name). The goal is to send a single notification job that delivers the Spanish message to the recipients who have requested Spanish as their language preference and the English message to those who speak English as their primary language.

This section assumes that you have already created your message in two languages (i.e. 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. Click the EasyStart button, and select the **Customize** option.
2. Select the list you want to notify.
3. On the Delivery Methods page, select what message types to include.
4. On the **Message Source** page use the **Select a Saved Message** option for each type.
5. For each message type selected, choose the appropriate default and alternate language message(s). The default message is the message everyone will receive if they have not specified another language; typically English, or if you have not created a message in their preferred language.

5. **Confirm** and **submit** your notification as you normally would.

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.

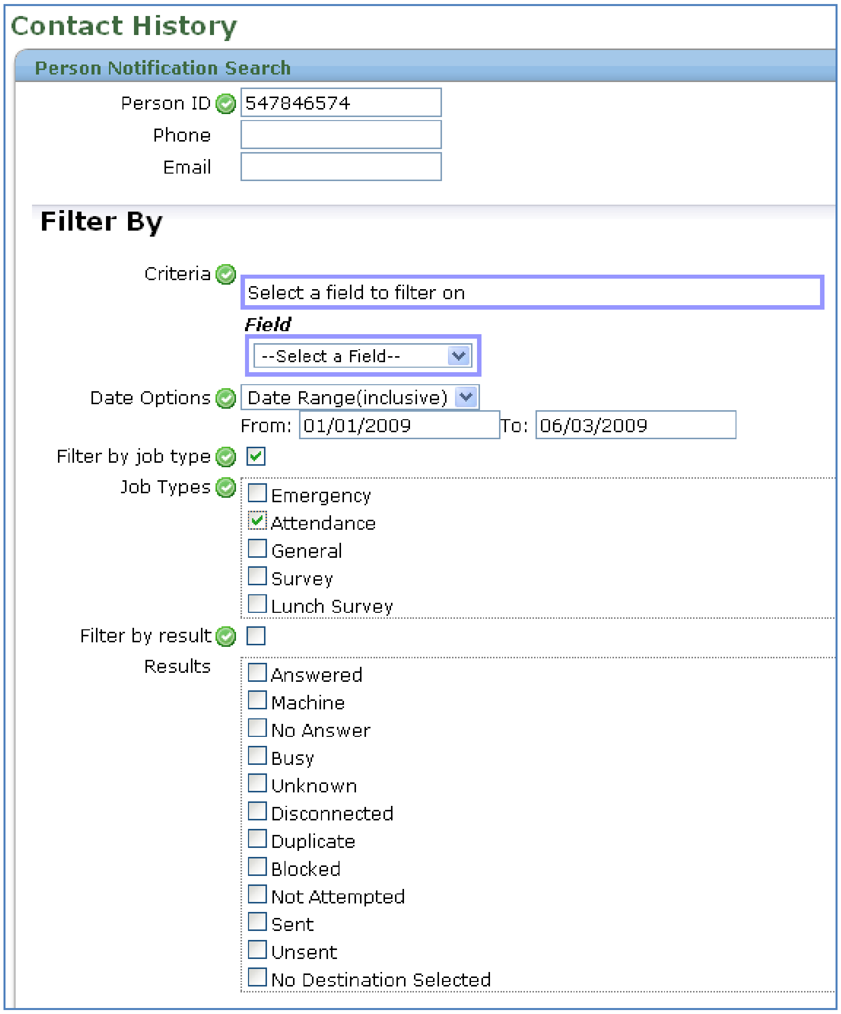
> *[Tip: Before calling into the system you will need your Telephone User ID# and Telephone PIN Code. These can be accessed and modified using the My Account button located in the top right corner of the window.]*

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.