



Getting Started

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Before you Begin


This guide will help you learn your way around your SchoolMessenger system so that you can easily broadcast your message out to hundreds, thousands, or even tens of thousands of people.

The intent of this training guide is to equip new users with the primary skills required to quickly and confidently send notification Broadcasts. 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.

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

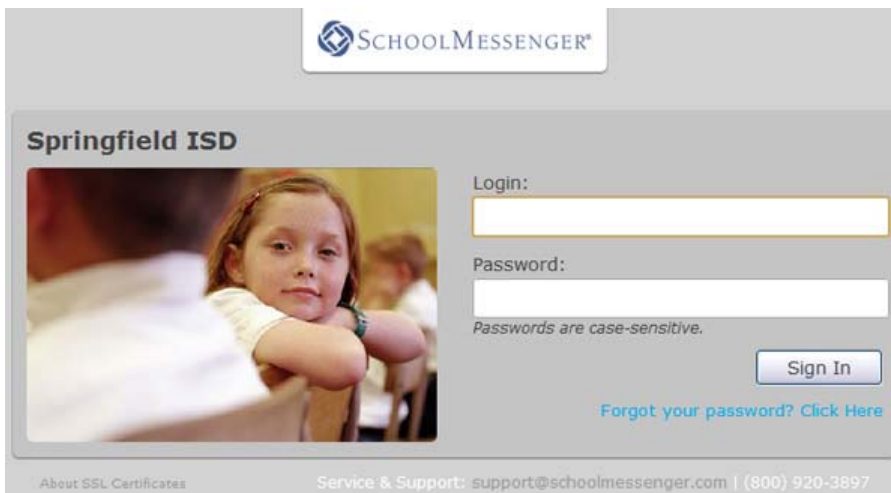
Bookmark Your Login Page

Before you log in and start familiarizing yourself with the system, you should bookmark the login page for your district on any computers you'll be using to send notifications. You should also write down the address and carry it with you in your wallet or purse.

 **Note:** *If you do not know the web address of your login page, contact your district's SchoolMessenger system administrator.*

- Enter the web address for your SchoolMessenger login page into any web browser.
- Add the login page to your bookmarks. Do this for any computer that you intend to use to send notifications (such as your work and home computers).

Every customer's login page is unique, so you should not expect that you will remember your specific login URL in the event that you are away from your personal computer and need to access the system.

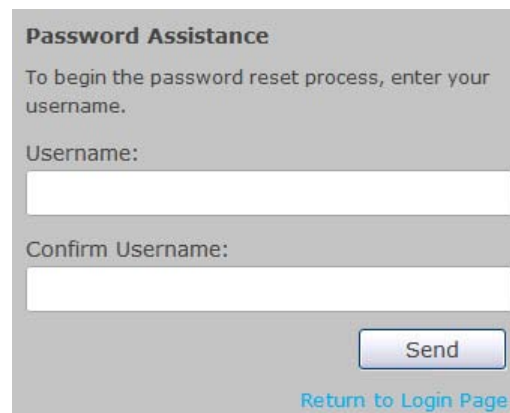


The screenshot shows the login interface for SchoolMessenger. At the top, there is a logo for SchoolMessenger. Below it, the text 'Springfield ISD' is displayed. To the left of the login form is a photograph of a young girl with her arms crossed. The login form includes a 'Login:' field, a 'Password:' field, and a 'Sign In' button. A note below the password field states 'Passwords are case-sensitive.' At the bottom of the form, there is a link that says 'Forgot your password? Click Here'. At the very bottom of the page, there is a footer with the text 'About SSL Certificates' and 'Service & Support: support@schoolmessenger.com | (800) 920-3897'.

Setting your Password

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

- Click the *Forgot My Password* link. You will be taken to the *Password Assistance* screen.
- Enter the username provided to you by the system administrator in both the *Username* and *Confirm Username* fields.
- Click the *Send* button. The system will email you at the address associated with your username.
- Check your email inbox for an email with the subject *Reset Password*.
- Click the link in the email to be redirected to a web page where you can reset your password.
- Enter and confirm your new password. For rules regarding passwords, please see *Appendix A: Managing your Account Settings*.
- Click the *Submit* button, and you will be logged into your account using the new password.




The screenshot shows a form titled "Password Assistance". The text reads: "To begin the password reset process, enter your username." Below this are two input fields: "Username:" and "Confirm Username:". At the bottom right of the form is a "Send" button and a link labeled "Return to Login Page".

Getting Started

Now that you've bookmarked your login page and have logged in to the system, you're ready to take the first step in developing your knowledge of the system.

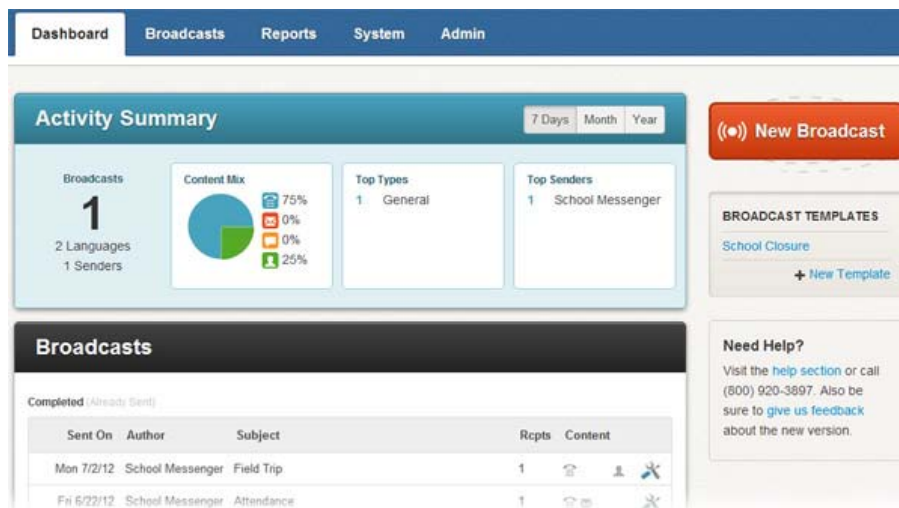
The Dashboard

 **Note:** *The Dashboard will be referenced frequently throughout this guide. Whenever you need to return to the Dashboard simply click the Dashboard tab at the top left of the screen.*

The *Dashboard* is the first screen you see when you log in to the system. It gives you a high level view of the system as well as the ability to quickly send a new Broadcast. On it, you will find the following tools and information:

- **New Broadcast:** This is the button to click whenever you want to quickly create a Broadcast notification to any combination of destinations. We'll be using this feature to send our first message in this training guide.
- **Broadcast Templates:** Broadcast Templates are small partially configured Broadcasts for messages which you might send frequently or wish to have instantly available for emergencies. These are covered in greater detail in the *Advanced Training Guide* as well as in the *Help* online.
- **Activity Summary:** This section gives you an overview of how the system is being used.

- **Broadcasts:** This section displays Broadcasts which are currently in progress and those which have recently been completed. If you mouse over the tool icon next to the job, a menu of common actions for Broadcasts pops up, including Edit, Report, Monitor, Responses, and Cancel or Archive, depending on whether the Broadcast is in progress or complete.



A Quick Overview

SchoolMessenger is used to send *notifications*, also referred to as *Broadcasts*. We refer to our notifications as Broadcasts because of the number of destinations we can deliver your message to simultaneously. Destinations include phone, email, SMS text messages, Facebook, Twitter, and RSS feeds.

Sending a message to a small group, to hundreds, or even to thousands of people is simple. The process of sending a message can be broken down into three basic steps.

1. Make a List

A list contains all of the people you want to receive your message.

2. Create your Message

You'll create message content for the different destinations you'd like to use.

3. Send the Broadcast

You may send your Broadcast immediately or schedule it for later.

Now that you have a little overview of the process, you're ready to send your first Broadcast!

Creating a New Broadcast

This will take you through a simple step-by-step guided process for quickly getting your message sent using the *New Broadcast* button on your Dashboard. The following sections will explain each step in detail. By the end of this tutorial, you will have successfully sent yourself a basic message with a phone, email, and component.

- Click on the orange *New Broadcast* button to get started.

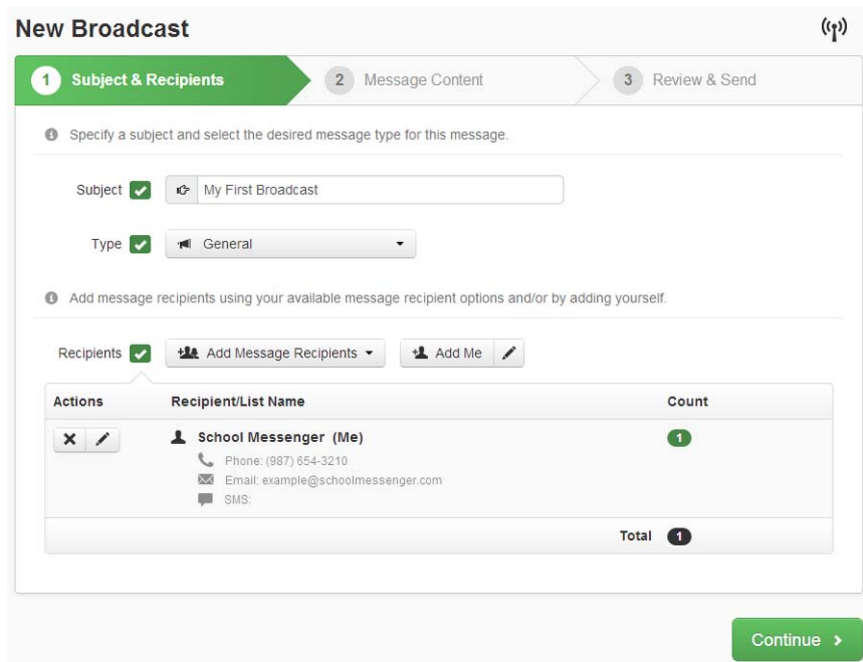


Step 1: Subject & Recipients

This is the first step you'll encounter when creating a new Broadcast. Here you'll enter the subject of your Broadcast and build a Recipient List.

The Subject field is the name of your Broadcast and will be used on any reports associated with your Broadcast. It will also be used to automatically populate the Subject line for your email message content.

The *Add Message Recipients* menu contains the various options for the various methods to select recipients. Normally when sending a Broadcast, you would either select a list you've already saved by clicking on *Saved Recipient Lists* or create a new list using *Custom Rules*, explained below.



New Broadcast (?)

1 Subject & Recipients 2 Message Content 3 Review & Send

Specify a subject and select the desired message type for this message.

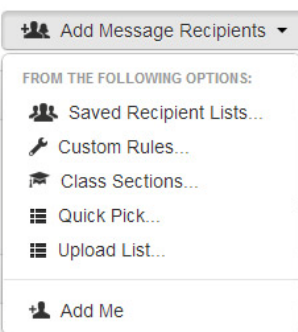
Subject

Type

Add message recipients using your available message recipient options and/or by adding yourself.

Recipients

| Actions | Recipient/List Name | Count |
|---|--|----------|
| <input type="checkbox"/> <input type="text"/> | School Messenger (Me) Phone: (987) 654-3210 Email: example@schoolmessenger.com SMS: | 1 |
| Total | | 1 |



FROM THE FOLLOWING OPTIONS:

- Saved Recipient Lists...
- Custom Rules...
- Class Sections...
- Quick Pick...
- Upload List...
-

Saved Recipient Lists

As you use the system and start to accumulate lists you'd like to reuse, this menu option will let you select one of your saved lists.

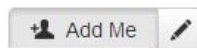
Custom Rules

This is the most common way to create lists of recipients. To use this feature, click on *Build a List Using Rules*. With rules, you are creating filters for specifying groups of recipients from your database. You can add more rules to narrow down your group to be as specific as you like.

Note: Building a list with rules is covered in detail, including examples of popular lists, in [Appendix A](#).

Note: To learn about the other options in the *Add Message Recipients* menu, please see the [Advanced Training Guide](#).

- For this training message, enter *My First Broadcast* for a subject.
- Then click the *Add Me* button, shown to the right. If your contact information is not already in the system, click the pencil icon and enter your information. For training purposes you will be sending a message to yourself only.



- Note:** To the left of each group of recipients, you'll find three buttons: . The X lets you remove a set of recipients, the cloud lets you save the group for later, and the eye lets you view the actual recipients selected.

Step 2: Message Content

After adding your contact information, click *Continue* to move to the next step, creating message content.

The Message Content step lets you easily create the content for each destination. Alternatively, once you've used the system for awhile, you may have some saved messages you'd like to use. Clicking the *Load Saved Message* button will allow you to reuse your saved messages.

For training purposes, let's create a simple phone, email, and SMS Broadcast.

If you would like to learn more about including social media content to post to Facebook, Twitter, and RSS feeds, please read the *Advanced Training* guide, which shows you how to set up and use these features.

Add Phone

- Click the *Phone* button.
- Select the *Call Me to Record* tab in the Voice Type area, as shown to the right.
- Enter a phone number where the system can call you.
- Feel free to use the Scratch Pad to plan what you're going to say. This is just a convenience for you and isn't saved anywhere.
- Click *Call Now to Record* and get ready to answer your phone.

- Click *Save Phone Message* to return to the Message Content screen.

The system will call you immediately. Simply follow the prompts to record your message. The first language you record is the Default language, typically English. After you record your message, you'll see a drop down menu for recording other languages. You can have the system call you again for each language, or enter a different number to have someone else record the message in another language.

You may have noticed that there are two options in the Voice Type area, *Call Me to Record* and *Text-to-Speech*. By default, you will be taken to *Call Me to Record*, however, if you would like to create your message in multiple languages using machine translation services provided by Google, you should choose *Text-to-Speech* to access these options. Messages created with text to speech will be read over the phone by a text-to-speech voice. You can learn more about recording multilingual messages in the *Advanced Training Guide*.

Add Email

Now let's add an email component to your message.

- Click the *Email* button.
- Enter your name in the *From Name* field.
- Enter your email address in the *From Email* field. This is the email address people may reply to regarding your message.
- *Subject* will be populated with the name of your Broadcast for your convenience. You may change the subject if you like.
- You may include up to three attachments with your email message.*
- Enter your email content in the Body field.**
- Click *Save Email Message* when you're done.

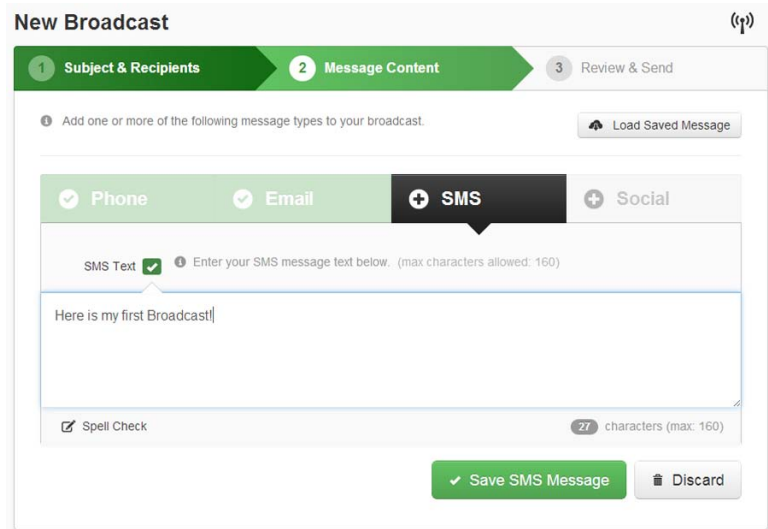
The screenshot shows the 'New Broadcast' interface with the 'Email' tab selected. The form is divided into three steps: 1. Subject & Recipients, 2. Message Content, and 3. Review & Send. The 'Message Content' step is active, showing fields for From Name, From Email, Subject, and Body. The 'From Name' field is populated with 'School Messenger', 'From Email' with 'example@schoolmessenger.com', and 'Subject' with 'My First Broadcast'. The 'Body' field contains the text 'Hello, This is my first Broadcast! It's so easy! Mary'. There are also buttons for 'Attach Files', 'Stationery...', 'Translate', 'Preview', 'Save Email Message', and 'Discard'.

***IMPORTANT:** You may attach up to three files that are up to 2MB each. For greater security, certain file types are not permitted. When sending attachments, keep in mind that most email accounts have limits set for the size of attachments. This limit can vary between email providers. Attachments which exceed the size limit will be rejected by the recipient's email provider and not delivered.

****IMPORTANT:** If you have already created a message using Microsoft Word and you want to paste that message into the HTML editor, you should be aware that messages which are copied and pasted from Word contain extra, non-standard, information which may cause your message to not display correctly. The system will automatically remove most of this information for you, but for best results it is better to compose your message using the HTML editor if possible.

Add SMS

- Click the *SMS* button.
- Enter your message in the SMS Text field.
- Click *Save SMS Message* when you're done.



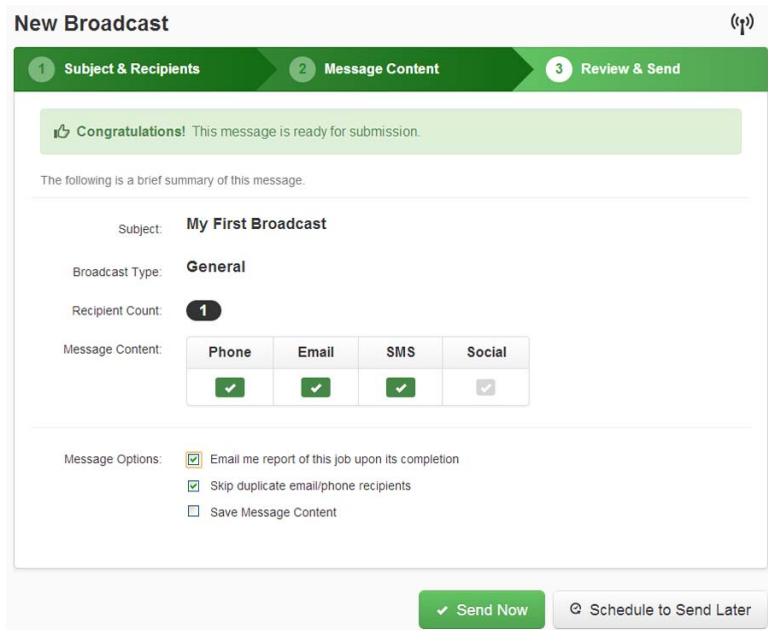
IMPORTANT: Before sending bulk SMS messages, you should check with your system administrator to ensure that the SMS “opt-in” process has been completed. While SMS messages are an effective way to communicate with people who prefer to receive information on their wireless devices, it is important to abide by the protocols established by the wireless carriers and industry regulators. If you would like to read more about this subject, please view the SMS Messaging content in the Help online.

Step 3: Review & Send

At this point, you've created a list of just yourself and a basic message with a phone and email component.

- Click Continue to move to the Review & Send stage.
- If everything looks correct, click *Send Now*.

Get ready because you're about to receive your first Broadcast message!



Tracking Progress

For this section, please make sure you return to the Dashboard.

As soon as you clicked *Send Now*, your Broadcast was moved into the *In Progress* position in the Broadcasts section of the Dashboard. It is possible that your Broadcast, since it only included one recipient, was sent so quickly that it already moved into the Completed area by the time you returned to the Dashboard. Typical Broadcasts have many more recipients and take slightly longer to be sent.

You can monitor delivery progress by mousing over the tool icon next to your job and clicking on Monitor.



Broadcast Summary

Once the Broadcast is complete, this menu will give you an option of viewing a *Broadcast Summary* by clicking the *Report* link. The *Broadcast Summary* shows the delivery results of the Broadcast. It is divided into three sections, designed to give you a quick overview of what happened with the job.

Related Links

Related Links provides access to additional report features such as exporting and printing reports.

Related Links ?

[PDF](#) | [Time Distribution](#) | [Recipients Not Contacted](#)

Summary

The Summary section shows a brief overview of the job settings.

| Summary | | | | | | | | | | |
|--------------|------------|----------|-----------------|---------------------------|-------------------|------------|----------|------------|-------------|-------------|
| Job Summary: | Job Name | Job Type | Submitted by | Scheduled Date | Scheduled Time | First Pass | Status | Recipients | # of Phones | # of Emails |
| | Field Trip | General | schoolmessenger | Jul 2, 2012 - Jul 8, 2012 | 8:00 am - 9:00 pm | 00:00 | Complete | 1 | 0 | 1 |

Totals

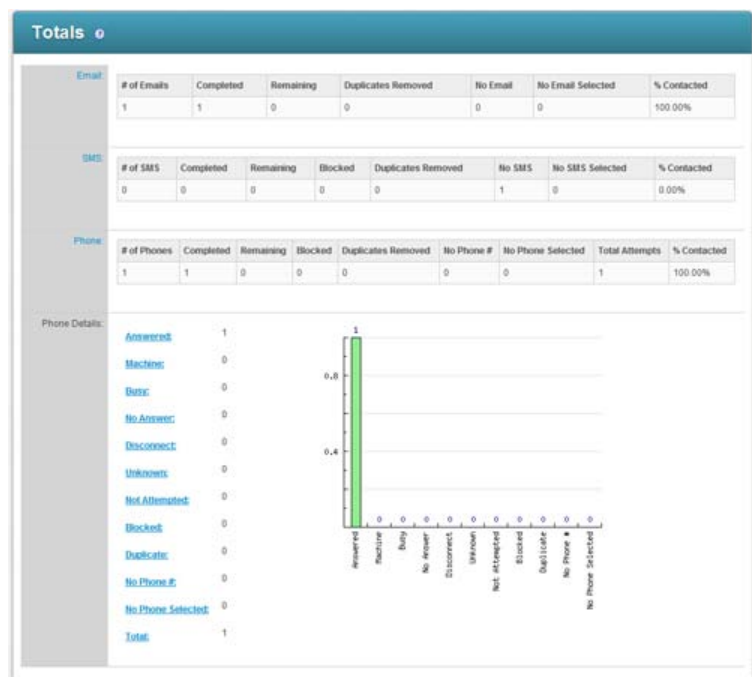
The Totals section contains a breakdown of the total calls, emails and/or SMS text messages sent in both numeric and graphical format.

You can access additional information by using the shortcuts to the left side of the bar graph. For example, to get a list of all of the disconnected numbers simply click the *Disconnect* link in the *Phone Details* section.

There are detailed explanations for each type of result in the *Reports* section of *Help*.

Other Types of Reports

It is also possible to generate a custom report that includes more specific information by using the report templates



found under the *Reports* tab. For example, with a Contact History report template, you can determine how many times a certain student was called specifically about attendance. Contact History reports can also allow you to determine which student ID numbers are associated with a particular phone number.

Many types of reports can be scheduled to automatically run at certain times. This is a great way to track regularly occurring data, like all of the disconnected results each month, a report easily generated using the Phone Log template.

View the *Reports* section in the online Help for more information by clicking the *Reports* link in the *Contents* section on the Help menu or by reviewing the *Advanced Training Guide*.

Appendix A: Creating Lists Using Rules


IMPORTANT: When you create lists using rules, you are using contact information in your database which is always being automatically updated. This means that you can save and reuse rule based lists and trust that they will always be up to date.

In this section, you will learn how to create a list using rules as well as how to configure some popular types of lists. These lists will be made in the Subject & Recipients step while creating a New Broadcast, just like you did in the main tutorial in this document. If you wish to try sending a Broadcast to a list you create using rules, simply substitute the list building step from this section and then continue creating your Broadcast as you did before.

Build a List Using Rules

In the Subject & Recipient step of creating a New Broadcast, click the *Add Message Recipients* menu and select *Custom Rules*.

You may filter recipients using fields from your database. Each rule is used to define the group of people you want to include in your list.

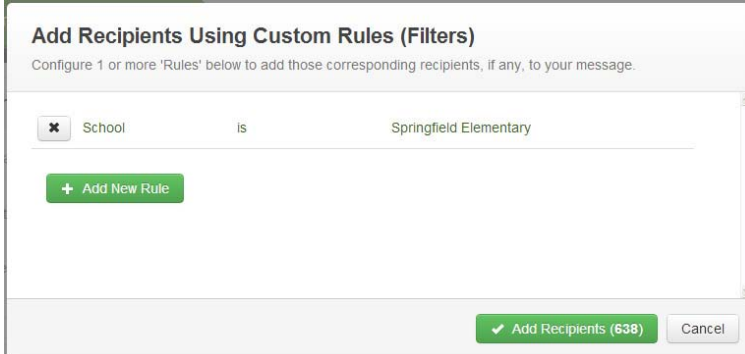
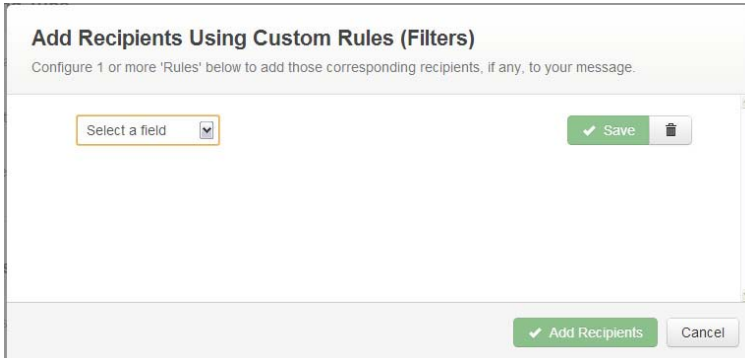
Once you create a list using rules, you can save the list for use in the future. Just click the file icon  to the left of the List Name in the main Subject & Recipients screen after you're finished adding rules.

The following sections will provide detailed examples of popular lists and demonstrate rules in action.

All School Student List

This list will contact all of the students in a particular school.

1. Select *School* from the *Select a Field* dropdown menu.
2. Click the checkbox next to the desired school.
3. Click *Save* to add the rule.
4. Confirm that the number of recipients is similar to the number of students you expected to include and click *Add Recipients*.



Staff List

1. Select *Contact Type* from the *Select a Field* dropdown menu.
2. Select *is* from the second dropdown menu.
3. Select *Staff* from the available contact types.
4. Click *Save* to add the rule..
5. Confirm that the number of recipients is similar to the number you expected to include and click *Add X Recipients*.

Grade Level List

Each rule you add to a list lets you select subgroups from your set of available recipients. You can add as many rules as you need to define a particular subgroup. This list will build on the All School student list by further specifying a particular grade.


1. Select *School* from the *Select a Field* dropdown menu.
2. Click the checkbox next to the desired school.
3. Click *Save* to add the rule.
4. Click *Add a Rule* to create another rule.
5. Select the options *Grade is* and click the checkbox next to the grade you want to specify.
6. Click *Save* to add the rule.
7. Confirm that the number of recipients is similar to the number of students you expected to include and click *Add X Recipients*.

More List Building Options

While rules are a very powerful and often all you need, they are not the only way to create lists. For additional information on creating lists, please review the *Advanced Training Guide* in the online Help by clicking the *Help* link in the top right of the screen. There you will find additional information on advanced list building. This includes steps to add/remove individuals who meet or do not meet your list rules, steps for uploading files, and more.

Appendix B: Managing Your Account Settings

You may edit your account preferences by clicking on the *Account* link at the top of any screen. You will be taken to the page shown below.

 **Note:** If your account was added to the system using a data import, you may be unable to edit certain fields. Additionally, you may not be able to edit some fields if your *Access Profile* does not give you permission to do so.

Use this screen to view or change your default account settings.

Your toll free number is: XXX-XXX-XXXX: Located at the top of the window. This is your *Remote Access* number that can be used to call into the system from any touch-tone phone in order to record a message and send a notification without the need of a computer. To learn more about this feature, please view the *Remote Telephone Access* section of the online Help.

Account Information

First Name: Your first name.

Last Name: Your last name.

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

Password: Your login password. Passwords are case sensitive, must be a minimum of 5 characters long, and must contain at least 2 different types of characters (letter, numbers, or symbols).

Phone User ID: The ID number that you could use to log into the phone system for *Remote Access*. ID numbers must be a sequence of at least four non-repeating numbers.

Phone PIN Code: The PIN code that you could use to log into *Remote Access*. PIN codes must be a sequence of at least four non-repeating numbers and your PIN cannot be the same as your *Phone User ID*.

Account Email: Your email address. This address will be used for auto reports. It is also the email address that will be used to send you a password reset should you forget your password.

Auto Report Emails: Any additional email addresses besides your own which should receive job completion auto reports should be entered here. Separate multiple email addresses with semicolons.

Phone: The phone number where you can typically be reached for recording messages.



Broadcast Defaults


Default Start Time: The earliest time you would typically like calls to be sent from your account by default. This will be additionally limited by your access profile, and you may have additional rights that allow you to send calls outside of these times.

Default End Time: The latest time you would typically like calls to be sent from your account by default.

Call Attempts: The default number of times you would like calls for your notifications to be attempted for numbers that are either busy or unanswered. This may be additionally limited by your access profile.

Days to Run: The default number of days you would like the system to keep your jobs active.

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

 **Note:** *Depending on the settings chosen by the system administrator, this value may be overridden by the toll-free call-in number.*

Display Settings

Action Links: You can specify whether you want links in the user interface to display with icons or simply as text.

Hide Email Editor Tools: Check this if you would like the HTML email editor tools to be hidden by default when creating email messages.

Appendix C: Quick Tips for Messaging

SchoolMessenger can be an effective instrument for building relationships with parents; the sound of the principal's voice can leave a lasting impression. The following points can help ensure that your messages are well received and understood by your recipients.

Be Prepared.

Before recording your message clearly define the content of the information you plan to send.

Write your message out.

Begin with the important information and get right to the point. Good messages always contain your name, your school and your position at the school.

Repeat important information.

Articulate Clearly.

You should speak slowly and clearly when recording messages – but not so slow as to lose the recipient's interest. It can be difficult to understand callers who speak too quickly. Write your message down and practice speaking crisply in order to be easily understood. Always listen to your message before sending it.

Create a Good Impression.

Messages are often your first contact with a parent so you want to make a good impression. Smile when you speak; people can hear it in your voice. Take a deep breath before you start recording; you want to keep your voice from trailing off. Put some energy in your voice and change the inflection; avoid sounding monotone. If you sound bored, your recipients will be less likely to pay attention. Remember, how you say something can be just as important as what you say.

Get to the Purpose of the Call.

In this age of information overload our attention span isn't what it used to be. Make it clear why you are calling and keep it brief. You generally have about thirty seconds (sometimes less) to convey your purpose before losing a listener's attention.

Avoid Calling about Numerous and/or Unrelated Topics.

Trying to cover a variety of complicated and/or unrelated issues in one phone message is not a good idea. Instead, break it up into multiple calls. This improves the chances that recipients will understand and remember your message.