

School*Connects* Basic Training Guide

for users of



SchoolConnects Version 9.50

June 16, 2015

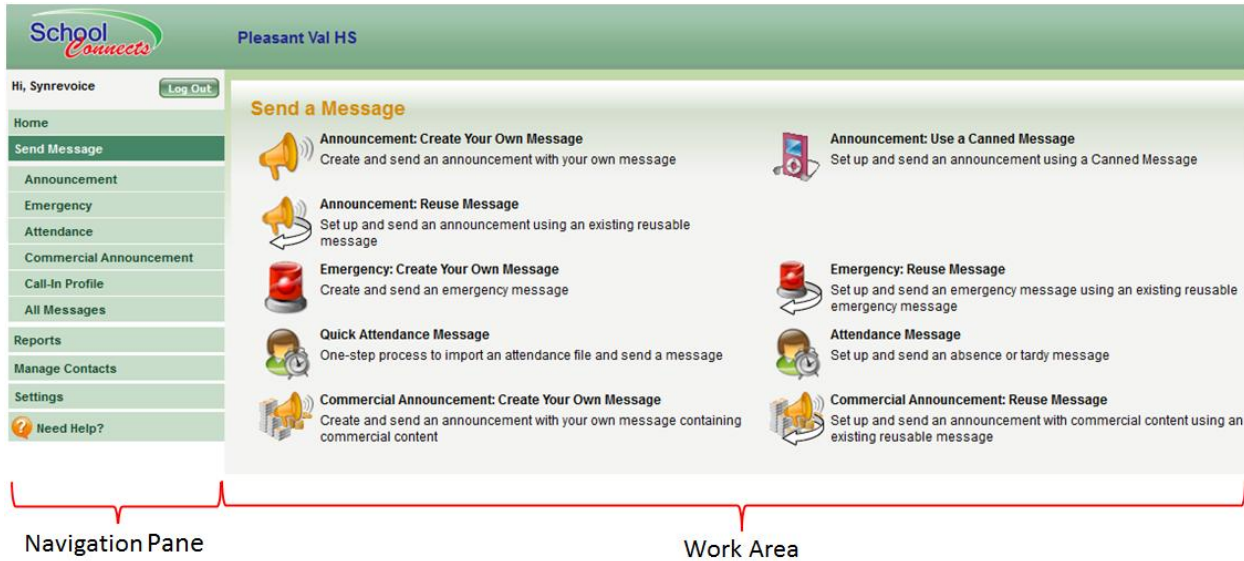
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The SchoolConnects Interface

After you have successfully logged into SchoolConnects by entering your User ID and password in the login screen, the following screen will appear:





It is the Home page of SchoolConnects, and it consists of two broad divisions: the **Navigation Pane**, on the left side, and the **Work Area** on the much larger right side. You can return back to the Home Page at any time from any other screen by clicking on the **Home** option in the **Navigation Pane**.

NOTE: Some of the icons in the above screen may not appear for certain users for whom permissions to the functions that they refer to have not been set. If you are missing any one of the icons on this screen, then discuss the matter with a SchoolConnects Administrator.

User Account Management

Change your own password or reset password for your coworker:

1. In the **Navigation Pane**, click **Settings**.
2. Hover over **Manage User Accounts**, and click on **Users and Administrators**.
3. Expand the school  and click the user icon  next to the user name.
4. On the **General** tab, enter the new **Password** and confirm it on the following line.
5. Click **Save**.

Create new user account:

1. In the **Navigation Pane**, click **Settings**.
2. Hover over **Manage User Accounts**, and click on **Users and Administrators**.
3. Click the **New** button.

4. On the **General** tab, user IDs can be alphanumeric or numeric. All-numeric User IDs and passwords are required to use call-in profiles.
5. Fill in the remaining required fields, selecting the appropriate user type. (The last two fields are updated automatically by SchoolConnects.)
6. When you open the **Permissions** tab, you see the suggested permissions for the user type selected (Administrator or User). Update these permissions as required.

If the user requires the ability to send Emergency messages, select **Emergency** as the highest priority.

Caution: Emergency calls take over the system, preventing all other calls from being attempted during the first pass of the Emergency message. Emergency calls are never combined with other calls, and can be sent out 24 hours a day.

Priority (High, Medium, Low) determines the message order when multiple messages are contained within the same call.

7. Click **Save**.

School Properties

In **School Properties**, you can:

- Re-record the School Name in your own voice,
- Enter the email addresses of people who will receive daily attendance reports, and
- Verify that the School Name and phone number that will be displayed on Caller ID screens are correct.

Note: You must be a "School Administrator" in order to make changes to the school properties.

***Please note that if you want to make changes to the School Name or Explanation Message recordings, Synrevoice can make these recordings for you so that the same voice is heard consistently throughout the delivery of all messages in English. Just send an email message to support@synrevoice.com, identifying your name, your school name, your phone number, and the new school name or explanation message you would like to have recorded. ***

To access School Properties:

1. In the **Navigation Pane**, click **Settings**. (You may have to scroll down to the bottom of the left panel to see the **Settings** option).
2. Hover over **Manage School Properties** in the **Work Area**, and click **School Properties**.

School Recordings

School Name as it is played in phone message.

The **General** tab contains the recording that plays your school name when call messages go out. When a parent receives a call from SchoolConnects, the school name recording identifies the school: "*<Pleasant Valley High School> calling, please hold or press 1*". To re-record the school name, click on

the “REC” button beside the school name message. This will take you to the Recording Centre screen, where you can then have SchoolConnects call you on your own phone for the purpose of recording the message in your own voice. Be sure to record the SCHOOL NAME ONLY. Do not record anything else. Keep the name as short as possible, preferably below 2 seconds.

The “explanation message” is used in attendance calls. It’s called the “explanation message” because it gives parents instructions on how to “explain” the attendance. For example: “*Please call the school at <phone number> or send a note to explain the absence.*” You can record your own explanation messages, as well. To do so, you will be referred to the Recording Centre once again.

Change email addresses to receive reports

In the School Properties **Email** tab, enter the email addresses of people who should be receiving detailed status reports concerning the outcome of all messages sent from SchoolConnects in the **Email To** and **Email CC** fields. Multiple email addresses can be entered in both fields, provided that they are separated with a semi-colon (;).

The **Reply To** field is the email address that will receive replies to email messages that you have sent out from SchoolConnects. In addition to receiving replies to your emails, this email address will also receive notices of undeliverable messages, which will then allow you to contact intended recipients and enter the correct email address or remove bad ones. It is a good idea to create a generic email address here (e.g. schoolname@_____), rather than using a personal email address which can be inundated with replies. (Only one **Reply To** email address can be entered in this field.)

Caller ID

School Name used in Caller ID

The School Properties **General** tab contains the school name as it will appear on Caller ID displays. The school name may need to be shortened to 15 or fewer characters in length if you get complaints from message recipients stating that their call display units say “Unknown” in place of the school name. This usually occurs on older call display units limited to 15 characters displays, and is usually not a problem with current equipment. This could be a very important consideration, in that many people do not answer calls from “unknown” callers, and they sometimes use telephone-answering devices that block calls from them.

School Phone Number used in Caller ID

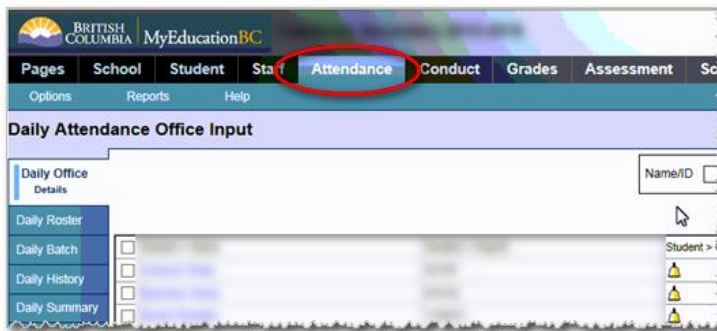
The School Properties **Contact Info** tab contains the school phone number that will appear on Caller ID displays. It **MUST** be 10 digits long, and must not include an extension. (The other two fields in this tab, Address and Contact Info, are optional and have no vital purpose.)

Attendance

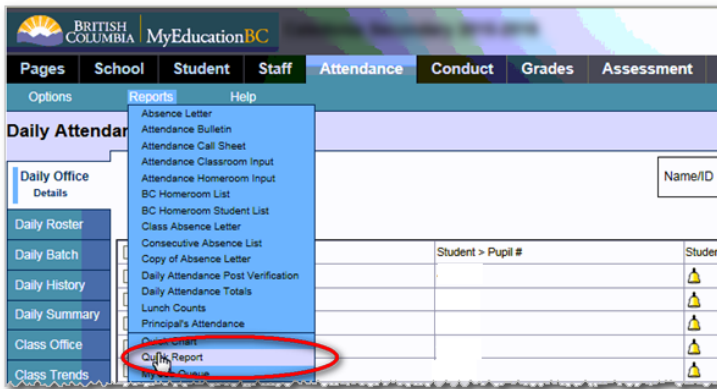
To send attendance messages, you must 1) generate the attendance file in MyEducationBC each day, and then 2) log into SchoolConnects and use the **Quick Attendance** feature to create the notification task.

Creating the Attendance File Extract in MyEducationBC

- 1) Click on the **Attendance** menu option.



- 2) Select the **Quick Reports** option from the **Reports** menu.

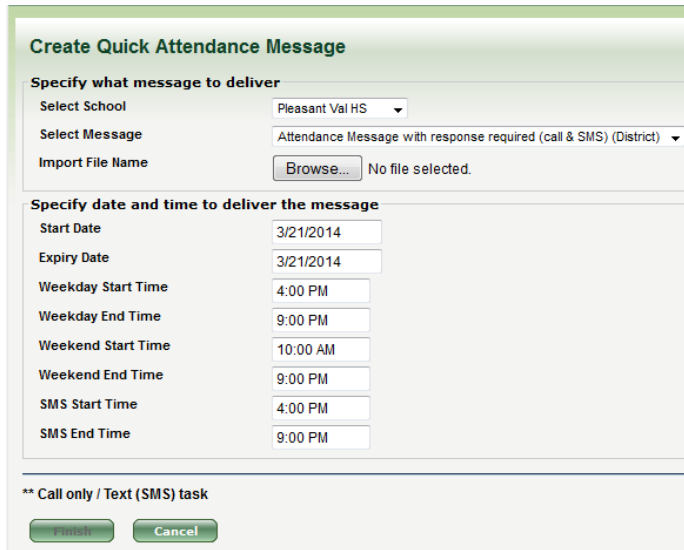


- 3) **Save** the extract file in a location where you can easily access it in the next step.

Creating the Attendance Notification Task in SchoolConnects

- 1) Click on **Send Message** in the **Navigation Pane**.

2) Click on the **Quick Attendance Message** option. The following screen will appear:

A screenshot of a web form titled "Create Quick Attendance Message". The form is divided into two main sections. The first section, "Specify what message to deliver", contains three fields: "Select School" with a dropdown menu showing "Pleasant Val HS", "Select Message" with a dropdown menu showing "Attendance Message with response required (call & SMS) (District)", and "Import File Name" with a "Browse..." button and the text "No file selected.". The second section, "Specify date and time to deliver the message", contains eight time and date fields: "Start Date" (3/21/2014), "Expiry Date" (3/21/2014), "Weekday Start Time" (4:00 PM), "Weekday End Time" (9:00 PM), "Weekend Start Time" (10:00 AM), "Weekend End Time" (9:00 PM), "SMS Start Time" (4:00 PM), and "SMS End Time" (9:00 PM). At the bottom of the form, there is a note: "** Call only / Text (SMS) task" and two buttons: "Finish" and "Cancel".

- i. Select your school from the **Select School** pull-down option if you have access to more than one school.
 - ii. Select the template that you wish to use for this attendance message from the **Select Message** pull-down option. The default template that you normally use should appear here.
 - iii. Set the date and time(s) that you wish to have this message delivered on.
- 3) Click on the **Finish** button to create the Attendance notification task.

Address Book

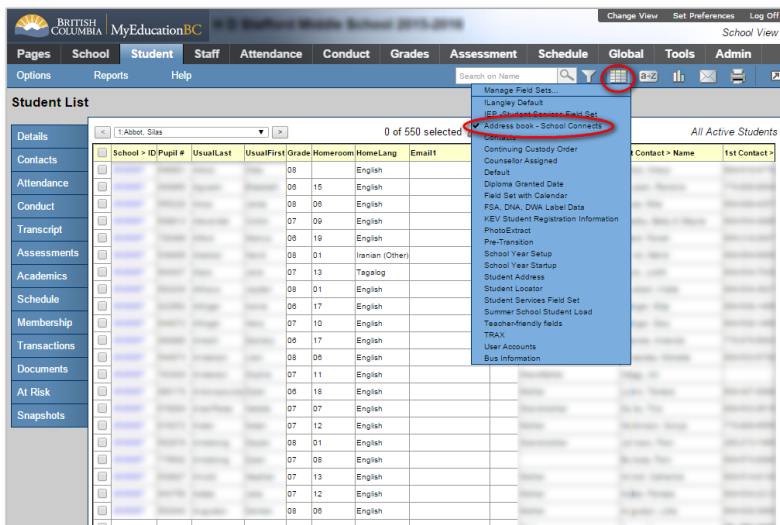
Transferring Student Contact Information from MyEducationBC to SchoolConnects

Messages sent from SchoolConnects use the SchoolConnects Address Book for contact information (phone numbers, email addresses, etc.). The SchoolConnects Address Book's data is derived from MyEducationBC through an export/import process. Getting the data from MyEducationBC to SchoolConnects requires:

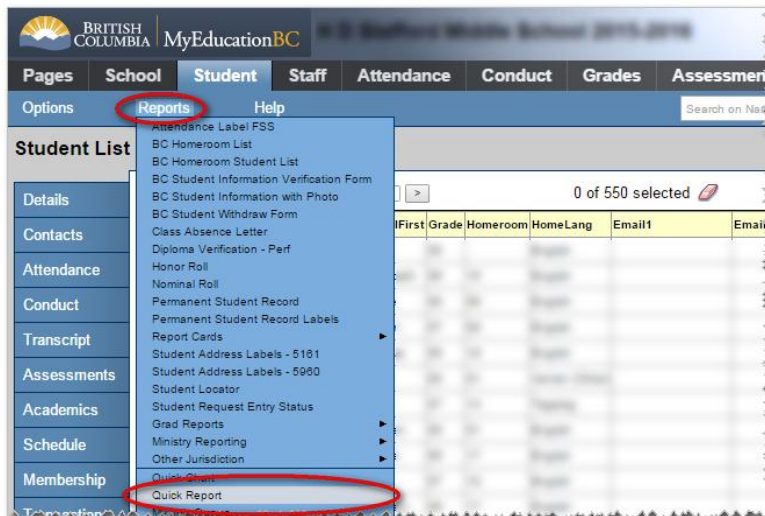
- A) the periodic extraction of current student contact information from MyEducationBC
- B) the importation of the data extracted from MyEducationBC into SchoolConnects.

A) Creating the Address Book File Extract in MyEducationBC

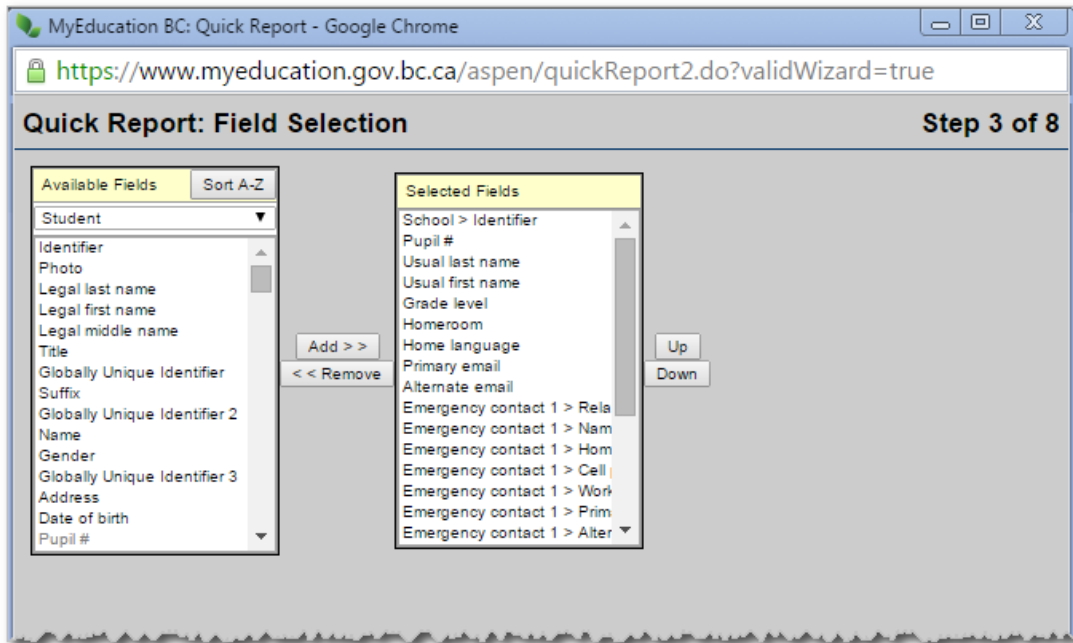
- 1) Click on the Field Sets icon and select the "Address Book -- School Connects" option:



- 2) Click on the **Reports** menu option and select **Quick Report**.

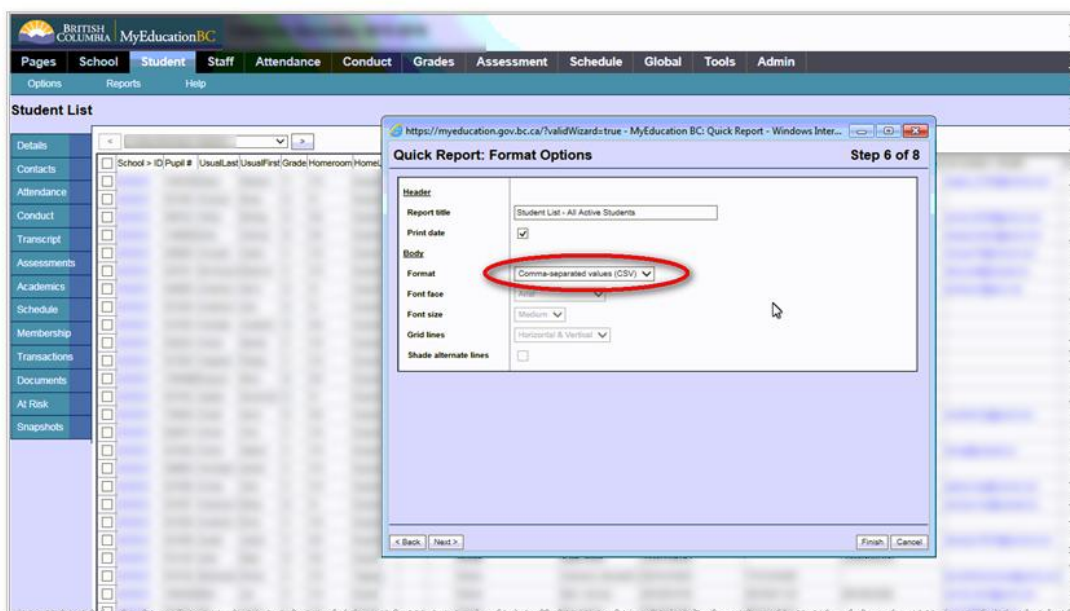


- 3) **New Report.** No changes here. Click **Next**
- 4) Keep default "Simple" selection. Click **Next**.
- 5) Do not add or remove any fields from the field set in Step 3 of 8:



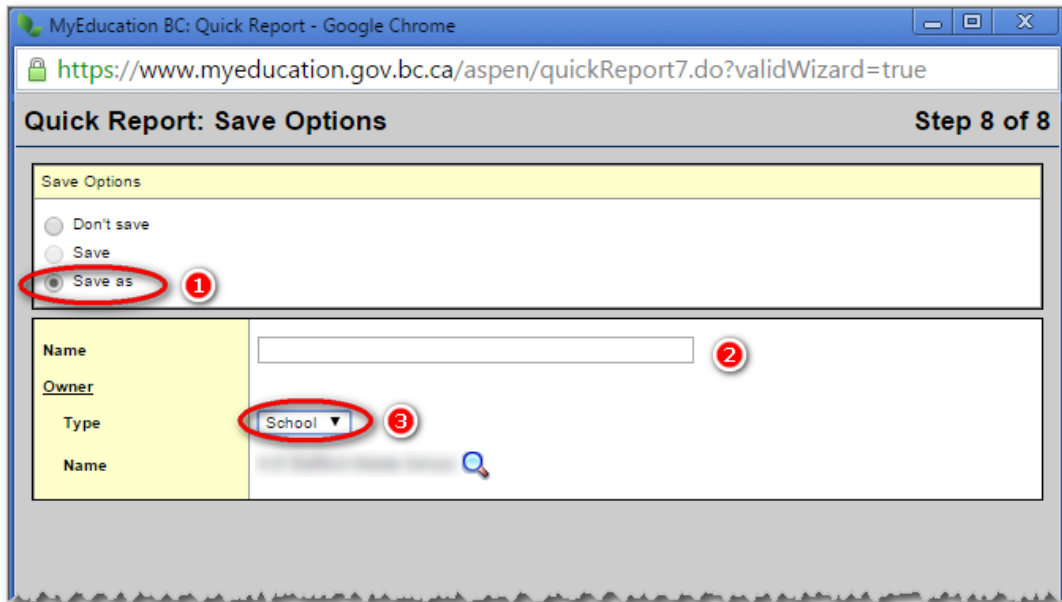
All the above fields are required to properly populate the SchoolConnects Address Book.

- 6) Click **Next** until you get to **Step 6 of 8**. Select "**Comma-separated values (CSV)**" from the **Format** pull-down option.



NOTE: Choosing anything other than "Comma-separated values (CSV)" will produce a file that cannot be used with SchoolConnects.

- 7) Click on **Next** without changing anything until you reach **Step 8 of 8**.



1. Click the **Save As** button.
 2. Enter a **Name** for your extract file. It will automatically be saved on your computer desktop.
 3. For **Type**, select the **School** option.
- 8) Click **Finish**.



NOTE: Before the above extract file from MyEduBC can be used with SchoolConnects, you must send it to Synrevoice as an email attachment so that your school can be properly set up to use it thereafter. This is a **once-only** requirement. You will be informed by email when your school has been set up successfully, and you can then proceed from creating the extract from MyEduBC in the above steps to importing it into SchoolConnects in the steps that follow without any further intervention.

B) Update the SchoolConnects Address Book by Importing from the MyEducationBC extract file.

- 1) Log in to SchoolConnects. Click on **Manage Contacts** in the **Navigation Pane**, and then on **Address Book** in the **Work Area**. The following screen will appear:

Address Book (Pleasant Val HS) (Total: 400 students)

Last imported on Jul 24, 2014 3:55 PM (EST) by Admin

Pleasant Val HS View By Grade ALL Sort By Name

Search By Name Enter Search Text

1	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
2	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
3	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
4	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
5	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
6	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
7	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
8	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
9	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
10	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
11	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>
12	<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>

- Click on the **IMPORT** button. The following screen will appear. Make sure that all three checkboxes are checked, as shown below:

Create Address Book from File

Select a file to import

Specify the Address Book File Specification

Select School

Import student personal information

Import other student contact information

Remove existing Address Book students who are not in the import file


- Click on the **BROWSE** button. Locate the export file you created in above in MyEducationBC, and then click on the **UPLOAD** button.
- Click on the **Import** button to update the SchoolConnects Address Book. (The date and time near the top of the page will indicated the current date and time.)

You never have to look at the Address Book, unless you want to do one of the following:


- Add an additional phone number to call for a particular student (e.g. an additional contact not found in MyEducationBC)
- Add a PIN for a particular student
- Verify the date and time that the address book was updated
- Search for students associated with an incorrect phone number or email address.

Accessing and Using the Address Book

In the **Navigation Pane**, click **Manage Contacts**, and then **Address Book** in the work area. By default, the contents of the address book are arranged by Grade. (This can be changed, if desired, by choosing a different option, such as Teacher, in the **View By** drop-down list, and then clicking on the **Go** button.)

Expand a grade (or other grouping) by clicking on the  sign in the green bar associated with the grade whose students' records you wish to see.


Two icons appear in the icon area next to each name ( and ). The first is used to access the *student record*, while the second is used to access *student contact records*.


Click on the green single-person icon  next to the student name. You will see the **Edit Student Properties** window. This is the student record.


The **General** tab contains student name, ID, grade, language, homeroom ID and homeroom Teacher (if applicable) from MyEducationBC.

The **Primary** tab contains the student home phone number and email address from the STUDENT screen in MyEducationBC. Any changes you make here will be overwritten by the automated update from MyEducationBC before next day. If, however, you need to edit it here because you need to correct something for a message slated to go out later in the day, then make the same changes here and in MyEducationBC.

The fields in the **Secondary** tab are *not* updated from MyEducationBC. You can manually enter up to two additional phone numbers using the "Mobile Phone" and/or "Alternate Phone" fields for calls, and a single alternative email address. These fields will not be overwritten when the Address Book is updated.

When you have finished reviewing or modifying/saving a student record, click on the back arrow  (located in the top right corner of the work area) to return to the list of students. **NOTE:** Use this arrow *whenever it appears* instead of your browser's back arrow. It will take you back to the previous page, whereas your browser's back arrow may take you back further, to the previous operation.

In order to access Student Contact information, such as Relatives, click the two-person icon  next to the student name. You will see the list of contacts associated with the student that were pulled in from MyEducationBC.

Click on the brown single-person icon  next to a contact's name to see that contact's information.


Each contact has a Primary and Secondary tab. Unlike the student record, the phone numbers and email addresses here *are* pulled in from MyEducationBC, and they **WILL BE** overwritten when the next update from MyEducationBC is pulled into SchoolConnects. Once again, if you need to edit information for a message slated to go out later in the day, then make the same changes both in SchoolConnects and in MyEducationBC immediately.

Fields that are not updated during the data import from MyEducationBC are the check boxes to the right of the phone numbers and email addresses. If a parent asks that you **not** contact them at a specific number or email address, uncheck the check box accordingly. **Note:** If you uncheck a phone number, you may want to also add the phone number to the Do-Not-Call list.

Be sure to click **SAVE** after you have made any changes.


Divorced or Separated Parents – make sure calls go to both parents

It is very common for divorced or separated parents to be entitled to and wish to be notified of school matters affecting their child. To be sure that both parents receive attendance calls, announcements, and emergency messages, you must insure that the other parent's phone number(s) and email address(es) are entered in MyEducationBC. You can verify that they are set up to be notified by:

1. Logging into SchoolConnects.
2. Clicking on **Manage Contacts** and then clicking on **Address Book**.
3. Find the student in question.
4. Click on the two-person icon  beside the student's name to "edit student contacts".
5. Locate the parent's record, and verify that their phone numbers(s) and email address(es) are in the Primary and Secondary tabs. If they are not, then the appropriate updates need to be made in MyEducationBC.
6. Set the Priority field in the General Tab to **01** to insure delivery of **all** messages to this contact.

PIN to confirm message received

Messages delivered to an answering machine can sometimes be deleted before a parent or guardian has the opportunity to hear them. To ensure that a parent or guardian receives the call, a parental PIN code may be added for a student in the Address Book. To do so:

1. Locate the student in the Address Book.
2. Click on the green person icon  beside the student name.
3. On the **General** tab, in the **PIN** field, enter the 4- to 12-digit numeric PIN that you and the parent/guardian have agreed upon using.
4. In the **PIN required to listen to messages field**, select **Yes**.

Note: The message template must be set up to require pin confirmation. Typically, only attendance calls use pin confirmation for students with PINs defined as above.

5. Click **Save**.

To confirm they have received the message, the parent must enter their PIN. Otherwise the system will call back until the PIN number has been entered, or until the number of calls limit (also defined in the message template, typically 5) has been reached.

Search Address Book for a Phone Number or an Email Address

Occasionally, you may have only partial information (e.g. a phone number, contact name, or email address) that you would like to associate with a full database record. For example, 1) you get a signed note from a mother whose last name is different than the child concerning whom the note is written for, but she identifies the child only by his/her first name; or, 2) you have a phone number on your call display unit that corresponds to someone whose attempt to leave you with an message on your voice mail in fact left you with an earful of static. You do not know 1) which student the mother is the mother of, or 2) you do not know who the caller leaving you an earful of static was.

In both of the above cases you can search the entire SchoolConnects database (student records and student contact records in the Address Book; all Contact Lists; and the Do-Not-Call list) to locate **all** records that correspond to the partial information you have. To conduct such a search:

Click on **Manage Contacts** in the **Navigation Pane**.

Click on **Search the Address Book or Lists**

Enter the partial information that you have in any one of the provided fields to get a comprehensive list of corresponding records.

Your search can be based on a Student ID, or a Student Name, or a Relative Name, or a Phone Number, or an Email Address. If you search for a particular phone number, for example, you will get a complete listing of ALL records in the Address Book, Contact Lists, or the Do-Not-Call list that contain that phone number.

Contact Lists

Contact Lists make it easy to send messages to special groups, such as the Senior Band, Football Team, school Staff, or Parent-Teacher Council. Contact lists can be made up from records in the Address book, or from records in an external file (such as an Excel file), or they can be entered directly into SchoolConnects. They can also consist of a combination from all the above sources.

To create a contact list

In the **Navigation Pane**, click on **Manage Contacts**, and then click **Contact List**.


Step 1. Click **New**, type in a contact list name, and click **Next**.

Step 2. **Import Source** tab: Select the source of your contact list: either an Import File, the Address Book, or manual entry. Click **Next**.

Step 3. The options that appear in this step depend on the Import Source you selected in the last step.

- ❖ If you selected Import File, you will be prompted for the file name. In this case:
 - Click the **Browse** button and find the contact list import file on your computer.¹ (This option is recommended instead of manually entering contacts if it involves a large list).
- ❖ If you selected Address Book:
 - Click the **Address Book** button,
 - Click **Select Subset or Individuals**,
 - Click **Select Individuals** and use the List By and Search By options, then
 - Click **Show Results**. Select individuals by checking the box next to their names. Click **Finish** when finished and to save your changes if you get interrupted.
- ❖ If you selected Manual entry:
 - Add the first contact by filling in all of the required fields, and click **Finish**. You will be returned to the list of all contact lists. Notice that your newly-created contact list is highlighted in yellow.

¹ This procedure requires telling SchoolConnects how to read your file. For an instructional video on setting up your "File Specification", log in to SchoolConnects, click on the "Need Help" link at the bottom of the left panel and click on "Instructional Videos". Enjoy watching "[How to create a contact list using my own \(import\) file](#)"

- Click the person icon  to add additional people.
- Click **New**, fill in the appropriate fields, and click **Save**.

Adding Contacts to an Existing Contact List

Additional contacts can be added to existing Contact Lists when the need arises. For example, there may be one or two volunteers in the community that may help out coaching a school sports team. Since they are not students, they must be added to the Contact List pertaining to the school sports team if they need to be contacted when members of the team are contacted. (It does not matter in this instance if the Contact List in question was created in SchoolConnects or automatically derived from a Trillium group.) To add a new contact to an existing Contact List:



In the **Navigation Pane**, click on **Manage Contacts**, and then click **Contact List**.

Step 1. Locate the contact list that you wish to add a contact to.

Step 2. Click on the **Edit Contact Info** icon ().

Step 3. Click on the **New** button, fill in the appropriate fields, and click **Save**.

Editing contact list information

1. In the **Navigation Pane**, click on **Manage Contacts**, and then click **Contact List**.
2. Locate the contact list and click the person icon  to view the contacts in the list. You can use the View By, Sort By and Search By fields to locate an individual.
3. If you wish to **edit** a record in the contact list, locate the record and click the green person icon  next to it. Edit the information and click **Save**.
4. If you wish to **delete** a record, click on the checkbox at the beginning of the record and then on the delete button near the top of the page.
5. If you wish to **add** additional records from the **Address Book**,
 - Click on the Address Book button near the top of the page,
 - Select the records you wish to add by clicking on the checkboxes next to the students' names
 - Click on the Finish button at the top of the page.
6. If you wish to **add** additional records from an external **Import File**,
 - Click on the File button
 - Click on the Choose File button, and select the file from which you wish to import data. (Note: the file does not necessarily have to be the same one that you used to create the contact list, but it **must** be identical to it, both in terms of the file type and the structure of the file.)
 - Click on the Import button.

Text Messaging (Special Rules and Procedures)

Unlike telephone calls and emails, there are special requirements that have to be met before text messages can be received by prospective recipients. They must authorize the reception SMS messages. The reason for this is that cell phone companies may charge SMS text recipients a fee for each message they receive. The following describes the rules and procedures for opting in and out of SMS text message reception.

1) To receive text messages, prospective recipients must take the phone they wish to receive text messages on and, from that phone, send a text message to Synvoice Alerts. In place of a phone number, they must enter the short code 56360, and in the body of the message, they must simply enter the word `Join`.

2) If the prospective recipient's phone number **doesn't** exist in SchoolConnects, they will receive a text message telling them to contact their school or district to get their phone number added. The school at this point should add the phone number both in MyEducationBC and in the SchoolConnects Address Book so that a renewed attempt at opting in can be made immediately. If the phone number **does** exist in the SchoolConnects Address Book, they will receive a confirmation message stating that they have been opted in.

3) Once people have subscribed, you can send an SMS-only message to every phone number and every category of phone number, and only those who have subscribed to receive SMS messages will receive the message.

5) SMS message recipients can easily opt out of receiving SMS messages by replying with the word `stop` to any text message sent from 56360. Or they can simply send a new text message to the short code with the word `stop` in the body of the message.

6) Please note, some phone plans and even some cell phone carriers do not support short code text messages, so that their customers may not have the ability to subscribe to SMS "short code" messaging, even though their phones support SMS "long number" messaging.

You might edit and simplify the above rules and procedures for SMS opting in an out to notify parents and guardians of this option. You could send out a call or email message from SchoolConnects to accomplish this task, and/or you could post it on your school web site and direct prospective SMS message recipients to it.

Announcements

Create your own message (General Announcement) – Set Up

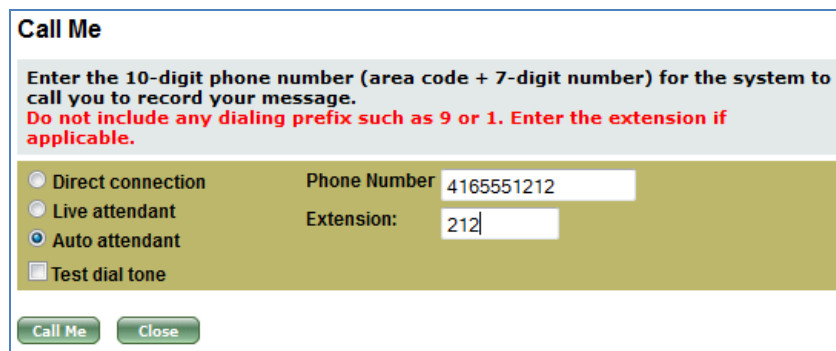
In the **Navigation Pane**, click **Send Message**, and click **Announcement: Create Your Own Message**. You will be prompted through *four logical steps* to create an announcement. They are:

1. Message name and a few general parameters
2. Choosing the means of delivery (call, email, SMS text, Twitter Tweet), the date, and the times for each delivery means.
3. Creating the message(s): Recording calls, creating emails, and SMS text messages
4. Selecting the recipients (from the Address book, Contact lists, or both, or an external file)

To create your own message, follow these steps:

- 1) **Step 1:** Enter a meaningful name for your announcement, one which aptly describes this message. (Do not use the default name. If you do, you will have difficulty locating the message in the future. The name you use should make identifying the message an easy task.) Leave the language as Multi-Language.² Optional settings include making the message reusable. **NEVER** click on “use school announcement settings” unless specifically told to by your SynreVoice representative. This would only occur if a special customization was made **JUST** for your school. Click **Next** to move on to step 2.
- 2) **Step 2:** You can change the delivery method (call, email, SMS text, and/or Twitter Tweet); the date and times for each delivery method; and the priority this message receives over other messages combined in the same call/email/text. Higher priority messages get heard/read first. **Next** to move on to Step 3.
- 3) **Step 3:** This is where the messages are created. The messages that you create here depend on the message delivery options you selected in Step 2.
 - a) **Recording Centre:** for recording a telephone message
 - i) Select your language and type in your message. You can use the text-to-speech converter to have the computer do the speaking for you, or you can record the message in your own voice. (The latter is almost always preferable, in that the human voice is generally more pleasant and much easier to understand than a computer voice.)
 - ii) For Text to speech Conversion: After you have typed in your message in English, you can click on **Generate Recording from Text** to create the computer-voice message.
 - b) Create a message in your own voice:
 - i) Click **Record**.

The following screen will appear:




- ii) Enter your 10-digit phone number, and, if applicable, an extension. If your phone system can automatically route calls to your extension, then select **Auto Attendant**. If a receptionist or some other person routes calls to your extension, then select **Live Attendant**. Otherwise, use the **Direct Connection** option.
- iii) Click the **Call Me** button and follow the voice prompts on the phone to record your message.

² Multi-language allows you to record a message in multiple languages, but requires an English recording. Selecting a specific language makes this the default language for the message. You must always select the students to receive the message in the other language. SchoolConnects does not select them for you!

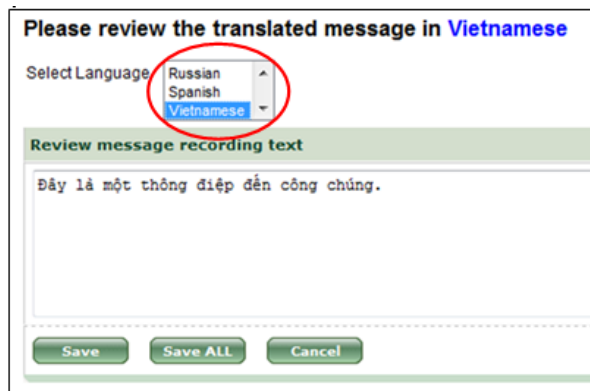
- iv) To hear the message you recorded, click on the **Play** button. If you are satisfied with the recording and do not wish to make additional recordings in other languages, click on **Hang Up** and **Continue**.
OR:
 - (1) If your message is incomplete, you can **Append** additional recording to it.
 - (2) If you are dissatisfied and would like to re-record the message, click on **Record** once again and follow the prompts. You can make as many attempts as you wish.
 - (3) If you wish to record your message in another language, select the appropriate language from the **Record Message In** dropdown menu, and return to step i.
- v) Once you are finished your recording, click **Continue** to proceed to creating the remaining messages, according to your selection of delivery methods in Step 2: email and/or SMS text.
- c) If you wish to **Translate** a message written in English to another of (or all) the supported languages, follow these steps:

HOWEVER, before using translation services in SchoolConnects, please heed the following caution **very carefully**:



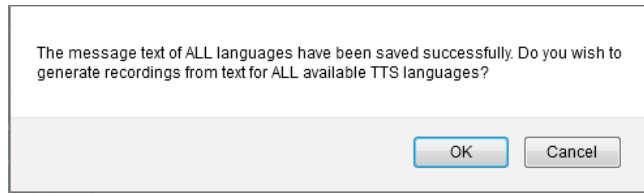
Write all text that will be translated into another language in the simplest and most literal terms. It is important to avoid using idioms, colloquialisms, figures of speech, and words that can be interpreted in unintended ways. Using idiomatic expressions like “students on the field trip are having a blast” will usually get translated into something like “students on the field trip are experiencing an explosion!,” which is deeply distressing and alarming! Use “students on the field trips are joyous” or something equally simple. Idioms are deeply ingrained in our thinking and speech, and can sometimes be taken for granted. Whenever possible, have someone who is familiar with the language verify the translation.

- i) Enter the text in the text box, and then click on the **Translate Text** button.
- ii) Select the language you wish to have the text translated to, or select **All** to translate to all the supported languages.
 - (1) If you selected **All**, then you will be shown the following screen, which will allow you to review the messages by selecting each language in the pull-down menu and cycling through them:

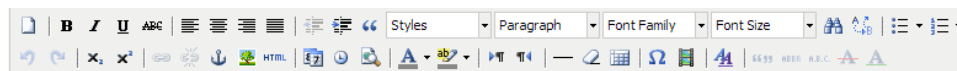


- (2) If you selected only a single language, then you will be able to review it alone.
- (3) Click on the **Save** or **Save ALL** button(s) the save the text translation(s).

- iii) SchoolConnects will inform you that it has saved the text translation(s) and prompt you to generate voice track recordings that correspond to the text translation(s).

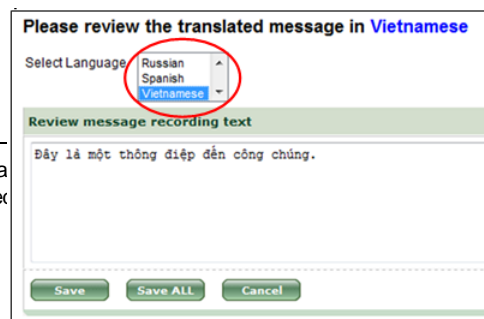


- iv) Click on **OK** to generate the voice track recordings if you wish to accept the default volume and speed at which the message will be delivered.
 - v) Click on **Play** to listen to the recording(s) in the selected language(s). Cycle through the recordings by selecting different languages from the **Record Message In** pull-down option.
- d) If you are sending an email message,
- i) Your emails can go out as either plain text or html rich text. To switch between the two, check and uncheck the **Send email as plain text** checkbox. When the checkbox is unchecked, the following toolbar appears in the email text box:



The tools in this toolbar are identical to most of the tools one might find in a popular word processing program. Hovering with the mouse pointer over any tool will elicit a description of its purpose.

- ii) Click on and enter text in the email subject line and the content box. Click on the **Tags** button to insert place-holders, such as the student name, into the email text. This allows you to personalize each email. The place-holders will be replaced by corresponding values from the address book for each student (e.g. <Student Name> will be replaced by the name of the student.)
 - iii) Optionally add attachments.³ Click on the **Add** button, and then **Choose File**. Locate the file(s), and then click on the **Upload** button to complete the attachment.
 - iv) Click **Next**.
- e) If you wish to translate the text in this message into another language, then ensure that there is a checkmark next to **Send email as plain text**. This is because all translated text must be in a plain text format. Then:
- i) Click on the **Translate Text** button.
 - ii) Select the language you wish to have the text translated into, or select **ALL** to generate translations in all the supported languages.
- (1) If you selected **All**, then you will be shown the following screen, which will allow you to review



³ You can have as many attachments a mov, etc.), however, cannot be attached

megabytes. Certain files (like exe, com, avi, security risks.

the messages by selecting each language in the pull-down menu and cycling through them:

- (2) If you selected only a single language, then you will be able to review it alone.

Click on **Save** or **Save ALL** to save the text translation(s).

Note: You can cycle through, display, and make modifications to the translated text by clicking on the **Select Language** pull-down option next to the **Translate** button.

- f) If you are sending an SMS text message,
 - i) Enter the text and **Tags** in the message box. Your message is restricted to 140 characters. Keep in mind that if you are using Tags, you should factor in the length of the longest expansion of a tag in your calculation of the overall length of the text message.
 - g) If you are sending a Twitter Tweet,
 - i) Enter the text in the message box. Your message is restricted to 140 characters. (You must have a Twitter account to use this option.)
- 4) **Step 4:** This is where the call recipients are selected.

Send the Announcement to the Whole School


- a) **If your intended message recipients are drawn from only the Address Book,**
 - i) and you wish to send your message to everyone in the Address Book (which is pre-selected by default), then skip to **Step 4b**.

Send the Announcement to Selected Groups of Students

- ii) If you wish to send your message to a specific category of recipients, such as all the students in a particular grade or a particular teacher's students, then,
 - (1) Click on the **Address Book** button, and then on the **Select Subset or Individuals** button on the next page.
 - (2) Click on the checkboxes next to every category of students you wish to send messages to. You can select multiple instances from each category. For example: You can select all grade 5 and grade 8 students, or just the students taught by teachers X and Y, or all the above (grades 5 and 8 AND teachers X and Y).

Send the Announcement to Selected Individual Students

- iii) If you do not wish to select whole categories, but instead wish to select *individual students*,
 - (1) Click on the **Select Individuals** option under the **Choose a method for selecting your recipients** banner,
 - (2) Make the appropriate selections in the **Choose a method for selecting your recipients** area to set up how the student records will be displayed,

- (3) Expand categories if you decided to **List** your data according to one of the categories (e.g. Grade) by clicking on the  sign next to the category.
- (4) Click on the checkboxes next to individual student records to include them in the recipient list.


Send the Announcement to All Individuals in One or More Contact Lists

- b) **If your intended message recipients are drawn from one or more Contact Lists,**
 - i) Select **Contact List** from the **Choose recipients from . . .** block, and then click on the **Contact List** button under **Select recipients**
 - ii) Checkmark all the contact list(s) you wish to use
 - iii) If you wish to contact **all** the individuals in the contact list(s) you selected, then click **Continue**, and proceed to **Step 4b**.

Send the Announcement to a Group of Individuals in One or More Contact Lists

- iv) If you wish to send your message to a specific category of recipients, such as all the students in a particular grade or a particular teacher's students, then,
 - (1) Click on the **Select Subset or Individuals** button on the next page.
 - (2) Click on the checkboxes next to every group you wish to send messages to. You can select multiple instances from each category. For example: You can select all grade 5 and grade 8 students (if you are working with a contact list involving students), or just the students taught by teachers X and Y, or all the above (grades 5 and 8 AND teachers X and Y).

Send the Announcement to Individuals in One or More Contact Lists

- v) If you do not wish to select whole categories, but instead wish to select individuals in one or more contact lists,
 - (1) Click on the **Select Individuals** option under the **Choose a method for selecting your recipients** banner,
 - (2) Make the appropriate selections in the **Choose a method for selecting your recipients** area to set up how the student records will be displayed,
 - (3) Expand categories if you decided to **List** your data according to one of the categories (e.g. Grade) by clicking on the  sign next to the category.
 - (4) Click on the checkboxes next to individual student records to include them in the recipient list.
 - (5) If you have chosen to use multiple contact lists, then switch from one to another by selecting the Contact List you wish to select individuals from the pull-down list next to the **Select Contact List** option
 - (a) Repeat all the above steps to select individual recipients from the various Contact Lists in turn.

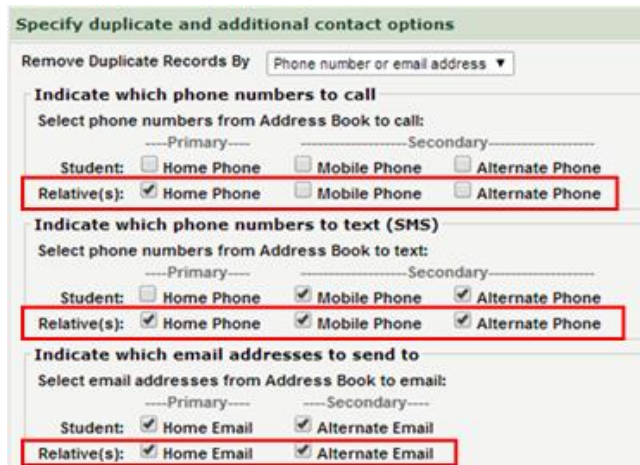
Send the Announcement to Individuals in the Address Book *AND* One or More Contact Lists

- vi) **If your intended message recipients are drawn from both the Address Book AND Contact Lists,**
 - (1) Follow all the above instructions for both Address Book and Contact List(s) message recipient selection

Send the Announcement to Individuals in an External File – for advanced users

- vii) **If your intended message recipients are drawn from an external file,**
 - (1) Select **Import File** from the **Choose recipients from . . .** block
 - (2) No other choices appear here for the present. Proceed to **Step 4b**, and then return here when you have made selections there . . .
 - (3) . . . Click on **Next** to advance. You will proceed to the Summary Screen, where you can review the choices you made so far.
 - (4) Click on **Next** once again. You will be asked to select a file. Click on the **File Specification** button if you are familiar with concept of mapping data from various file types to fields in a database. (If you are not familiar with these concepts, then seek advice or aid from the Support team at Synvoice.) Create the file specification.
 - (5) Click on the **Browse** button and select the file that you created the File Specification for.

Step 4b: Selecting **Additional Contact Options** from the **Optional Settings** block allows you to select the phone numbers that will be used to notify the recipients you have selected above. The following options are preselected for you.



NOTE: Do not change any of these preselected settings to insure delivery of messages to appropriate recipients.

You can check off appropriate boxes as you see fit. Emergency messages, for instance, should probably have all the checkboxes marked with a checkmark. The selections you make will be determined by the age of your students, the lifestyle and concerns of parents, how they feel about receiving messages on multiple media, and others factors.

Selecting **Call Cascading** from the **Optional Settings** block provides you with two options under the **Call everyone or stop when relative is contacted bar**:

- **Call Each Selected contact:** which, when selected, calls all selected contacts

AND

- **Cascade until the message is successfully delivered to all priority 01 contacts:**
SchoolConnects calls and attempts to sequentially deliver the message 1) first to all telephone numbers (home; mobile; and alternate) associated with Priority 01 contacts, and then 2) to lower priority contacts if Priority 01 contacts have not been contacted.
- There are three standards denoting “delivery” that are applied in cascade calling. The cascade will only terminate when the standard is met. The standards are: 1) lenient, 2) moderate, and 3) stringent.

1) *Lenient:* The message is considered delivered when either a person answers or the message is left on an answering machine or on voicemail.

2) *Moderate:* The message is considered delivered only when a priority 01 person **answers and confirms reception of the message by pressing 2**. If the message is played, but no one presses 2, the system will continue calling the other phone numbers in the cascade, but it will not retry any phone numbers where the message was played.

3) *Stringent:* The message is considered delivered only when **ALL** priority 01 persons **answer and confirm reception of the call by pressing 2**. If no confirmation occurs, SchoolConnects will continue calling until confirmation occurs. Unlike priority 01 recipients, the cascade will end for non-priority 01 recipients if any non-priority 01 recipient confirms reception of the call. (Synrevoice recommends using this option in only the most serious emergency situations.)

- All three of the above options will continue calling additional non-01 priorities until the designated delivery standard is met. Ongoing attempts to contact 01 Priorities will continue until messages are successfully delivered, or until the time frame allotted has expired.
- 5) **Summary Screen:** The summary screen presents you with a summary of all the choices you made in the previous four steps. You should review the contents of this screen before submitting the task, especially if it is slated to go out immediately. You want to be sure that you got everything right!

Re-Use a Message you created

What if you want to use the same message over and over again? Suppose your school has a pre-paid lunch program and you want to be able to notify parents and guardians when the lunch account is low or has fallen into negative territory. This is the type of thing that you will likely find yourself having to send out messages for on a regular basis, so you will want to create a message that you can reuse, rather than having to record a new message each time. Such a message can be sent out daily or weekly, or whenever you see fit.

A message can be made reusable at the time when it is created. To do so, you place a checkmark next to the **Make message reusable** option in **Step 1** of creating a message. It is available for both general and emergency messages.

Enter a descriptive message name

Announcement Name

Choose a language for your message

Language

Optional Settings

Make message reusable

Once you have created a single reusable message, your Home page will have a new option added to it that looks like this:



Re-Send a Message to the same Group

You can send the same message to the same people once again (or over and over again, for that matter). To do so:

- 1) Click on the type of message (or **All Messages**) under the **View Message . . .** banner in the **Navigation Pane**.
- 2) Click on the date that the message was last sent out on.
- 3) Locate the message you wish to resend in the **Work Area**.
- 4) Click on the **Send Again** button located in the title bar of the message:



Low Lunch Balance (District)															
		Call		Email		Start Date		Expiry Date		Priority	Call Time	Email Time	School	Sent By	Created
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No	Yes	12/13/2013	12/13/2013	Low		12:00 AM - 11:59 PM	Synrevoice Test School	Admin	12/10/2013 7:54 AM

Note: Resent messages will be sent to the exact same recipients who were selected when the original message was created. You will have to create a new message if you wish to change the recipient list.

Use this button sparingly, for you need to have compelling and defensible reasons for sending the same message to the same people repeatedly.

Canned messages

There is only one major difference between using the **Announcement: Create Your Own Message** and **Announcement: Use a Canned Message**:

In **Create Your Own Message**, you are required to record your voice message and type in the other messages; whereas in **Use a Canned Message** you do neither: they are both set up for you, and you may simply be

required to select a set of variables to be incorporated into a canned message. The variables you choose are then inserted as sound bites into the Canned Message.

The steps involved in setting up a Canned Message are virtually identical to creating your own message, with one major exception in **Step 3**. The following table shows the differences:

Step	Announcement: Create Your Own Message	Announcement: Use a Canned Message
1	Give the message a name and a few general parameters (e.g. message reusability)	Select a pre-named stock message from a drop-down list
2	Choosing the means of delivery (call or email), the date, and the times for each delivery means	Choosing the means of delivery (call and email only), the date, and the times for each delivery means
3	Creating the message: Recording the calls	Select and/or enter the variables that you would like to incorporate into the Canned Message
4	Selecting the recipients (from the Address book, Contact lists, or both)	Selecting the recipients (from the Address book, Contact lists, or both)

The following screen shows the list of variables that are selected and entered for the **General Invitation** canned message:



Refer to the above section on Create Your Own Message to review all the additional steps involved in setting up a message in SchoolConnects.

Emergency messages

Creating Emergency Messages involves stepping through the same four steps that creating general Announcement Messages and Canned Messages involves. The **ONLY** difference between those messages and Emergency Messages is that Emergency messages can go out at any time (24 hours a day), they take precedence over any other messages, and they are never combined with other messages. They are the highest-priority messages in the SchoolConnects system. **NOTE: You can only create Emergency messages if you have been granted permission to do so.** (See User Account Management to learn how to set this permission.)

Commercial Announcements

Creating Commercial Announcements involves stepping through the same four steps that creating any of the other announcements involves. The only difference is that the email part of commercial announcements will be delivered only to individuals who have subscribed to receiving email messages with commercial content (in compliance with the requirements set out by the Canadian Anti-Spam Legislation of 2014).



Launching Messages by Phone – Call-in Profiles

A message can be launched and sent by using **nothing more than a telephone** if the need arises. There are a variety of scenarios where this may be required, such as equipment failure (computer or Internet), or where such equipment is unavailable. One can imagine the latter case: e.g. on a broken down bus that is transporting the school soccer team back from an evening game. The coach would like to be able to notify parents of the delay, but no one is back at the school office that can create an emergency broadcast in SchoolConnects to do so, and no equipment to generate such a broadcast is on board the bus. **BUT IF a Call-In profile has been created** in advance to facilitate such an emergency situation, then a complete Emergency Call message can be created in very short order from the coach's cell phone and delivered as soon as possible.

Note: You can only use Call-In Profiles if you have modified your password within SchoolConnects. This password is distinct from the Single Sign-On password you login in with. See Appendix A for detailed instructions on changing your SchoolConnects Call-In Profile Password.

To Set up a Call-In Profile:

1. In the **Navigation Pane**, click **Settings**.
2. Hover over **Manage Message Templates**, and then click **Call-In Profile Setup**.
3. Click **New**.
4. Give your Call-In profile a descriptive name. Optionally, you can limit the length of the message. Click **Next**.
5. Click on **Create New Message** Template.
6. Create your template: Name it, indicate the number of days to call, priority, call times, intended recipients, etc. *All this information must be preset here accurately, and is not subject to alteration when the profile is deployed and the message is being created on the phone.* Click **Next**.
7. Choose to call all contacts, or cascade and stop when a person is contacted. If this is an emergency where **it is imperative** that a person confirms receiving the message, and where SchoolConnects will continue calling until such a confirmation is made, select cascading with the last option: **A priority 1 contact must confirm receipt of the message by pressing 2.** Click **Next**.
8. Specify how duplicate records are determined, and click **Next**.
9. Optionally, select any additional contact numbers to call within the household record, or all numbers found in relative records.
10. Click **Next**.
11. If you are using a contact list, check **Include the following contact list(s)** and select the contact lists you wish to use. Click **Next**.
12. If you are using the Address Book, check **Include the following Address Book(s)**.

13. Select the school(s), and then select either all students or select a group using basic criteria, such as grade or homeroom. Click **Next**.
14. Select the users who will use this profile, and click **Next**.
15. Review the summary. Click **Finish** and then click **Close**.
16. Your profile is highlighted in yellow. Click the Notepad icon  and click the **Users** tab. Users who can use the profile have a checkmark next to the printer.  Click the printer icon and print the Profile Job Access Guide, which contains all the instructions required to record and launch a Call-In Profile-based message.

To launch a call, users of the Call-In profile must follow the printed instructions and respond to the voice prompts in order to record and send their messages.

Modifying and/or Viewing Messages

Any message that has been created can be either reviewed (if it has already been sent) or previewed and modified (if it has not yet been sent).





Messages can be reviewed going as far back as 999 days. This is useful when you need to review a message from some time in the past. (For example, you know that last year's holiday concert announcement was met with great enthusiasm, and you would like to send something out that is similar to it; or someone disputes the information that was sent out in a previous message, and you need to reference and review it in order to settle the matter.)

Messages that have not yet gone out, but are scheduled to go out, can still be modified, both in terms of their content (voice recording) and their settings (recipient list, delivery times, etc.)




To Review or Modify a Message:

In the **Navigation Pane**, beneath the **View Messages . . .** banner, click on the type of message that you would like to reference. Your choices are: Announcement, Emergency, Attendance, and Call-in profile, or All Messages.

Click the date that the message either went out on or will go out on from the calendar that appears in the **Navigation Pane**. You will see all the messages corresponding to the message type you chose in the previous step in the **Work Area**. Next to each message is a group of icons.

Call Response Absence Message		Select All	Deselect	Call	Email	SMS	Start Date	Expiry Date
					Expired	Yes	No	12/11/2013

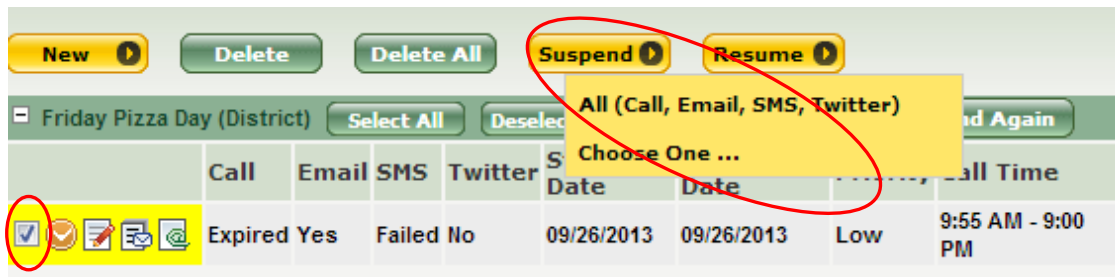
Each icon has a particular function, and each will produce a new page on your screen that corresponds to that function.

- The **View or Edit Message Settings** icon  is used to set or review the date and time(s) messages are slated to or have gone out, etc. The voice track recording can still be fully modified for messages that have not gone out, fully reviewed for those that have gone out. Click on selected tabs to review or modify various settings beneath them.
- The **View or Edit List Details** icon  is used to review the list of all recipients who either have or will receive messages. To view the tabs and the lists they encompass, click on the **View List** button. A very useful and important feature is available here: the ability to review or preview the contents of a call through a sample call.
 - To Preview or Review a Call:
 - Click on the checkbox next to any call recipient's name in the call list.
 - Click on the Sample Call button.
 - Enter your phone number, extension, and select the appropriate call type option from the pull-down list.
 - Follow the voice prompts when the telephone call comes through to you.
- The **View a Report** icon  generates a report that is identical to the daily reports that you receive for each message. It is useful here when you wish to retrieve a report for past messages. (Since you know that you can retrieve these reports for up to 999 days, you neither have to save nor print the reports you receive daily. They are easily accessible here at will.)

STOP calls from Going Out

Suspend a Message

If you created an announcement but want to stop it from making calls, click on the checkbox in the announcement's icon area, and then click on the **Suspend Messaging** button:



The screenshot shows a control panel for a message titled "Friday Pizza Day (District)". At the top, there are buttons for "New", "Delete", "Delete All", "Suspend", and "Resume". Below these are buttons for "Select All", "Deselect", and "Send Again". A dropdown menu is open, showing "All (Call, Email, SMS, Twitter)" and "Choose One ...". Below the menu is a table with columns for "Call", "Email", "SMS", "Twitter", "S", "Date", "Date", "Priority", and "All Time". The first row of the table has a checkbox in the icon area (circled in red) and the text "Expired Yes Failed No". The "S" column contains "09/26/2013" and "09/26/2013", and the "All Time" column contains "9:55 AM - 9:00 PM". The "Suspend" button is circled in red.

Select All to suspend your call message, since no other types messages are available to you.

Your message will then be marked "suspended". To resume sending out your message, click on the checkbox once again, and then click on the **Resume** button.

Suspend attendance calls

Using the Restriction Schedule feature, you can stop the automated attendance calls from going out in advance, for a day or two or for a longer period of time. To do so:

1. Click on **Settings** in the **Navigation Pane**.
2. In the **Work Area**, hover over the **Suspend Messaging** option, and then click on **Restriction Schedule**.
3. Enter a **Start Date** and an **End Date** for the restriction. If it is for one day, the start date and end date should be the same. The dates are inclusive: if the End Date is today, calls will go out tomorrow.
4. You must enter a reason for the restriction; for instance, "Attendance Secretary Absent".
5. Select the Type of Message (usually just Attendance). Make sure Call is selected.
6. Click **SAVE**.

The automated attendance extract will still create the attendance message for your school, but it will be **SUSPENDED** and no calls will be sent.

If you change your mind and want the calls to go out after all, you must first **CLEAR** the restriction by going back to Settings – Suspend Messaging – Restriction Schedule and clicking the **CLEAR** button, and then **RESUME** the task if it has already been created.

Do-Not-Call List

Indefinitely stops calls and/or emails to a phone number/email address associated with a student. The stoppage remains in force until its entry is removed from the Do Not Call List. To enter an item in the Do No Call List:

1. In the **Navigation Pane**, click **Manage Contacts**.
2. Click on **Do-Not-Call List**.
3. Click on **New**.
4. Select the **types of messages** that you wish to stop delivery of: All, Announcements and Emergency, or Absence.
5. Click on the Blockage options:

Block Messages to Phone Number or Student?

Block calls to the specified phone number

Block calls and emails for the specified student ID

Block emails for the specified student ID and calls to the specified phone number for this student ID

Phone Number

Student ID

The Phone Number and Student ID fields appear only when you have chosen the last option.



Note: The student ID MUST be the 9-digit student ID, not the 10-digit ID. If phone numbers in MyEducationBC are not entered with the full 10 digit (area code + phone number) format, then you need to create two Do No Call list items: WITH area code and once WITHOUT area code, in cases where the phone number may appear both ways in contact lists or in MyEducationBC.

For 18-Plus Year-Olds who have requested that messages not be sent to their homes, choose 1) the types of messages to suppress, and then select the middle option from among the Blockage options: **Block calls and emails for the specified student ID.**

6. Type in a comment that documents the request or situation that gave rise to creating the Do Not Call List item. It may be required to explain its presence in the future.
7. Click **Save**.

Message History for an Individual

Review messages to individuals, phone numbers, or email addresses within a date range. You will be able to find out how many times SchoolConnects attempted to contact that person/phone number/email address during the specified time period and what the status of each message attempt was. You can get Message History as far back as six months.

1. In the **Navigation Pane**, click **Reports**, then click **Message History Report**.
2. Select the type of message you wish to have the report cover.
3. Enter a student ID, student name, phone number, or email address. If a student's last name is typed in, the history report for all students with that last name is returned. Likewise, if a phone number is typed in, the history for that phone number is returned. Typically, you only need to use one of these fields. If you enter multiple values, the results must match every value.
4. Select the start and end dates by clicking on the calendar icons . 
5. Select **Call History** and/or **Email History**. (Select Email History ONLY if you ONLY entered an email address).
6. Click **Get History**.

Report Statuses

[For instructions on how to generate a report for a message, click here.](#)

Delivered – Key Pressed: SchoolConnects delivered the message and the person at the other end pressed a key in response to the message.

Delivered: SchoolConnects delivered the message and the person at the other end did not press any keys in response to the message.

Delivered – Machine: SchoolConnects delivered the message to an answering machine.

Busy: SchoolConnects called but received a busy signal. System hangs up and will retry the call again after at least 15 minutes have passed.

No Answer: SchoolConnects called but there was no answer after 6 rings. System hangs up and will retry the call again after at least 30 minutes have passed.

Carrier Rejected: SchoolConnects received a digital code from the local telephone provider that it could not connect the call. Possible reasons: phone number not in service; all circuits currently busy; recipient (if cell phone) is out of range or phone is turned off; call recipient has call screening, call waiting, call blocking or some other feature turned on. SchoolConnects retries numbers when it gets the “carrier rejected” status; sometimes the number can be undeliverable the first try but delivered the second or third try. But usually, the number is really “not assigned” and you should attempt to get a new phone number for the student.

Hangup: SchoolConnects called but the line disconnected before SchoolConnects could deliver message.

Filtered: The call was not made because the Phone Number or Student ID is in the Do Not Call list.