System Administrator Training Guide

West Corporation

100 Enterprise Way, Suite A-300

Scotts Valley, CA 95066

800-920-3897

www.schoolmessenger.com

Contents

Before You Begin

This training guide will show you, the SchoolMessenger Communicate System Administrator, the system's basic administrative features allowing you to be able to manage user accounts, including your own, as well as data configuration.

This guide is only for basic training and only spotlights certain features. Other features are covered in the online help resources. For end user feature-specific training refer to the *Getting Started* and *Advanced Training* guides, downloadable from the online help. You can also try the simple step-by-step guide in the online help, found under "Send a Basic Message".

Overview

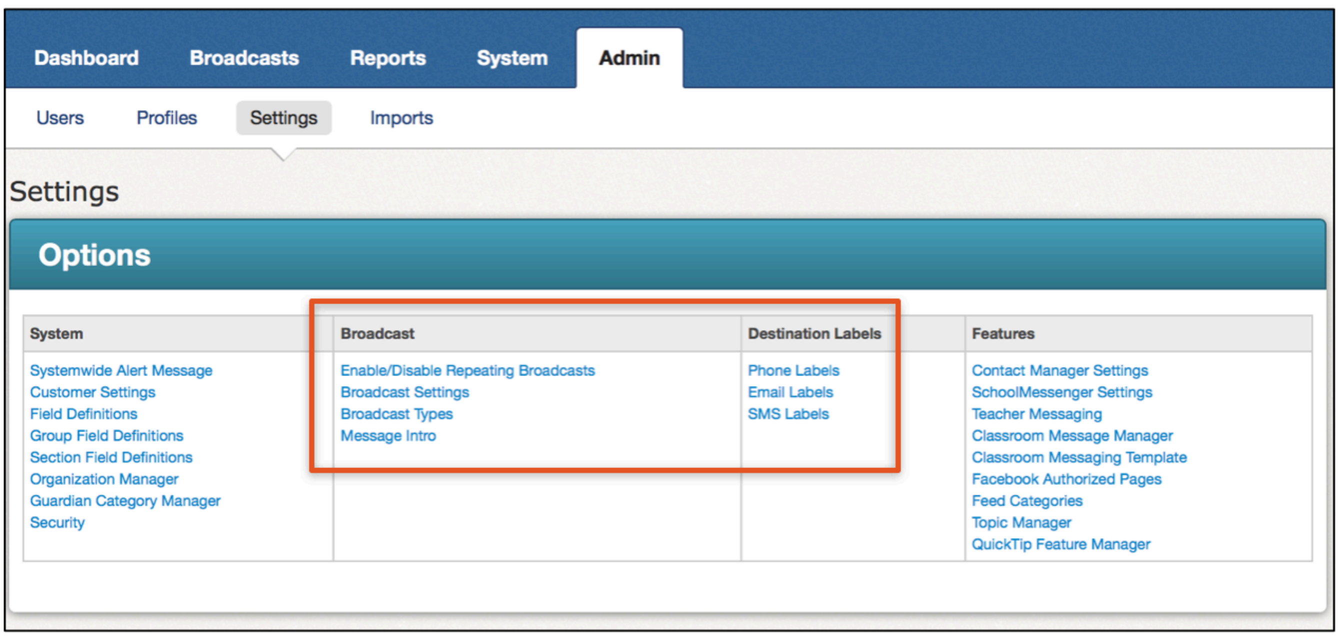
This guide is organized to help you prepare the system for data, set up user accounts and security profiles, and import data. It is organized into these major topics:

1. **Broadcast Types and Destinations**: Configure the types of Broadcasts the system will send and to which destinations. Learn how to set up Broadcast types and label destinations. These are things you can do prior to importing data or setting up users.
2. **User Management:** This section covers how to set up Access Profiles and manually create a user account.
3. **Data Imports:** Learn how to import your contact data. You'll also see how to import user data to create user accounts automatically.
4. **Other Useful Features:** Learn about other useful features in the system.

Broadcast Types & Destinations

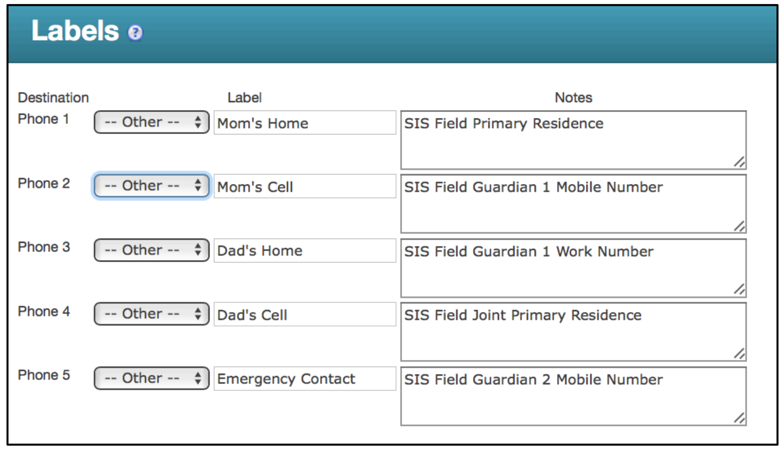
The primary purpose of the system is to deliver information to recipients via multiple modes of communication. We refer to these multimodal notifications as Broadcasts. This section covers some of the things you can do in the system prior to importing data or setting up users.

The features in this section are found under the Admin tab in the Settings subsection, shown below. This section will be primarily concerned with the links under *Destination Labels* and *Broadcast*.



Destination Labels

Destinations are the phone numbers, emails, and SMS numbers associated with each recipient. The links in the Destination Labels column allow you to select the label for each of the destination types in the system. For example, *Phone 1* might be labeled "Home" and *Phone 2* might be "Work", such as in the Phone Labels screenshot shown to the right. It's a good idea to label destinations before you create Broadcast types or import data because doing so will make selecting destinations for Broadcasts and mapping destinations to your data a bit easier.



Important: Labels should be generic descriptions of the destination. These labels will be viewable to others, including recipients if you have the Contact Manager feature.

Adding Labels

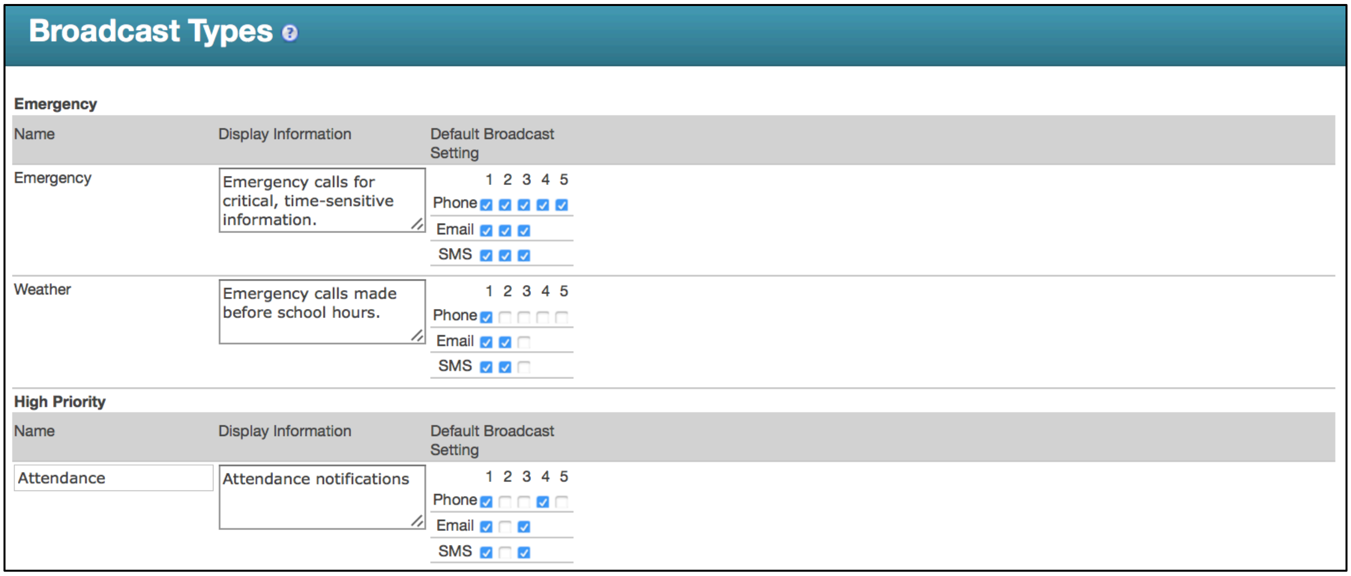
- In the Destination Labels column, simply click the link for the type of destination you would like to label.
- Select the label that describes the destination. You may also optionally enter a note about the label. If you need to create a custom name, select **Other**.
- Click **Done** when you've finished adding labels.

Broadcast Types

Each Broadcast is assigned a specific Broadcast Type, which controls the destinations which will receive the notification. You can view and add Broadcast types, as shown below, by clicking the **Broadcast Types link**.

Broadcast Types are used to create generic categories of Broadcasts differentiated by their default destinations, introduction message, priority, and which users may use them. This section will cover how to create a new Broadcast type. User restrictions will be covered in the Access Profiles section.

Note: Only the Emergency Broadcast type should be set to go to all destinations. Over-targeting recipients for non-emergency notifications is a primary cause of people choosing to opt out of the system.



Creating a New Broadcast Type

You can easily create a new Broadcast type. New Broadcast types will be General priority.

Important: Some recipients may request messages only be sent to certain destinations or not have a certain destination type available, such as users who do not have an email address. To maximize delivery success, it is important that you do not attempt to override the system's intended behavior by creating Broadcast types that only include a single destination, such as "Email Only" or "Phone Only".

- In the Broadcast column, click the **Broadcast Types link**.
- Click the **Create New Broadcast Type button**.
- Enter the name for the Broadcast type. This is how it will be seen by users creating Broadcasts as well as by users when they edit delivery points.
- If the Broadcast type is for sending surveys, check the survey checkbox.
- In the Display Information field, enter a brief description of the types of Broadcasts which will be sent using this Broadcast type. This text will also be displayed to users.
- Select the default destinations. Typically Phone 1, Email 1, and SMS 1 are considered the primary destinations.

Deleting a Broadcast Type

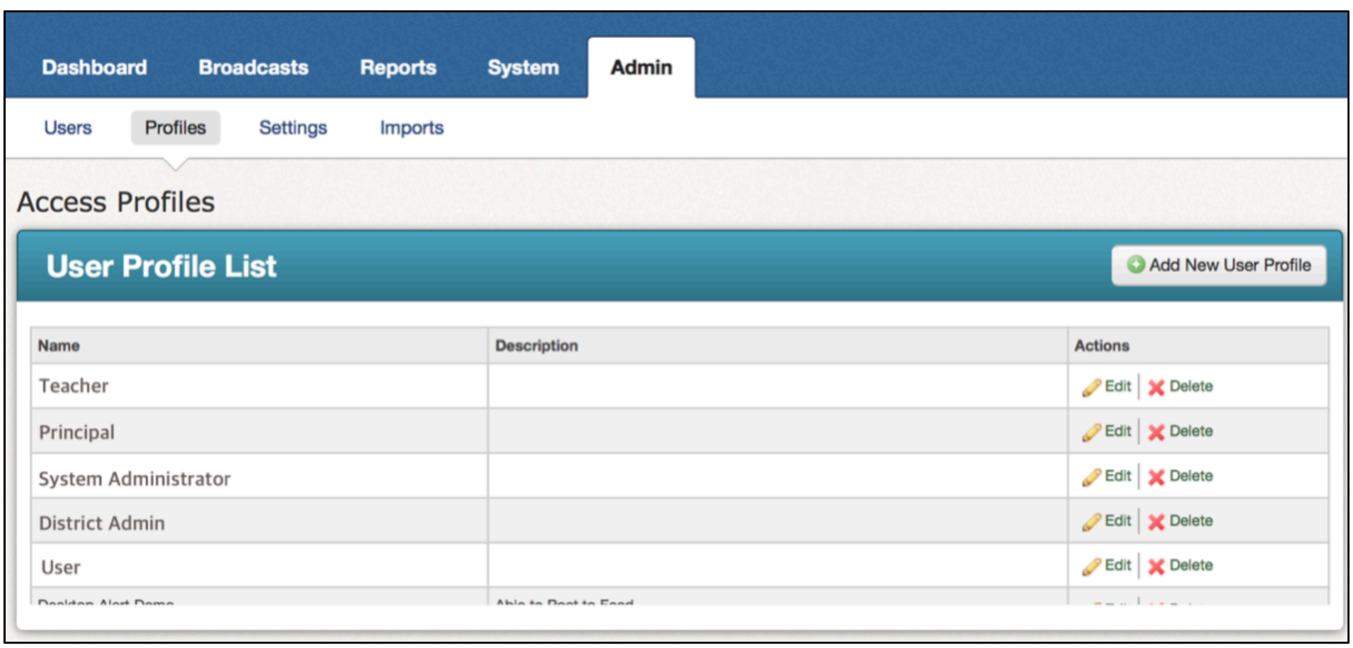
You may delete any general priority Broadcast types by simply clicking the **Delete button**. Emergency and High Priority Broadcast types may not be deleted. If you need to modify these Broadcast types, please contact support for assistance.

User Management

This section covers how to control user access to system features with Access Profiles, disable or enable users, and manually add a user. Importing users will be covered in the Data Import section.

Access Profiles

Access Profiles allow you to control which features certain groups of users may access. This section will show you how to create, edit, and delete Access Profiles then describe the different settings in the Access Profile editor.



You'll find the Access Profiles screen, shown below, by clicking **Profiles** under the Admin tab.

Important: Once you create Access Profiles, if you decide to import your users, make sure to specify the profile for each user in exactly the same way (spelling and capitalization) in your CSV. Otherwise, the Access Profiles in your user data will be created automatically with no options selected and you'll need to edit them after the import.

Creating a New Access Profile

1. Click the **Add New User Profile** or **Add New Guardian Profile button**.
2. Enter a brief name and optional description for the profile.
3. Configure the profile, then click **Save**.

Editing an Access Profile

1. Click the **Edit link** to the right of the Access Profile.
2. Make any changes to the profile, then click **Save**.

Deleting an Access Profile

Simply click the **Delete link** to the right of the Access Profile.

Access Profile Options

There are many options available when creating or editing an Access Profile. This section contains a brief description of each option to help you configure and understand your choices. Depending on your district's settings, some of these options are hidden until enabled.

Login Options

- **Log in via web:** Check this option to allow users with this profile to access the system via their computer's web browser.
- **Log in via phone:** Check this option to allow users to log in by calling and entering their Personal Identification Number.
- **Edit Personal Account:** Check this option to allow users with this profile to edit their personal account information such as their name and password.

Messaging Options

- **Outbound Recording:** Check this option to give users with this profile the ability to use the Call Me to Record feature.
- **Send phone calls:** Check this option to allow users with this profile to create phone messages.
- **Customize Confirmation Message:** Allows users to set the phone message that gets played when a message confirmation is detected.
- **Customize AMD Message:** Allows users to set the phone message that gets played when an answering machine is detected.
- **Can't Schedule Before:** Select the earliest time a call may be sent from users with this profile.
- **Can't Schedule After:** Select the latest time a call may be sent from users with this profile.
- **Max Call Attempts:** Select the number of times the system may attempt to call a recipient for Broadcasts created by users with this profile.
- **Voice Responses:** Check this option to allow users with this profile to enable the voice response option on their Broadcasts.
- **Message Confirmations:** Check this option to allow users with this profile to request confirmation from contacts over the phone.
- **Send Emails:** This allows the user to create email messages.
- **Require Email Content on All Messages:** Requires user to send an email with each message.
- **Require Translation:** Requires translation of message prior to being sent.
- **Send SMS text messages:** This allows the user to send SMS message notifications.
- **Multi-language Messages:** Check this to enable the Multilingual Broadcast Options feature on all enabled Broadcast types.
- **Send Classroom Messages:** If your system has Classroom Messaging, check this option to allow users to send classroom messages.
- **Add Remark to Classroom Message:** Click this to allow users to add remarks to the pre-made classroom messages.
- **Post to Facebook:** Select this option to allow users to authenticate a Facebook account and post messages to the Facebook page.
- **Post to Twitter:** This option allows users to authenticate and post to their Twitter account.

- **Post to Feed:** Select this option if users with this profile should be able to post to RSS feeds.
- **Post to Presence:** Allows user to post emergency and news alert messages to Presence-based websites.
- **Can Create Stationery:** Allow user to create and use stationery for email messages.
- **Restrict to Stationery:** Users with this selected are required to use stationery when creating email messages.

Advanced Broadcast Options

- **Create Repeating Broadcasts:** This gives the user the ability to create Repeating Broadcasts such as attendance.
- **Create Secure Document Delivery:** Allows user to upload and send secure documents.
- **Create Surveys:** Allows user to create surveys.
- **Override Caller ID:** Allows user to override caller ID on a broadcast to be any number.
- **Max Broadcast Run Days:** This sets the maximum number of days a user can schedule a Broadcast to run.

List Options

- **Create & Edit Lists:** Check this to allow users to create or edit lists.
- **Upload Lists by ID#:** Allows user to upload CSV files containing a list of ID numbers associated with system contacts to create lists.
- **Upload List by Contact Data:** Allows user to upload a CSV file containing a list of recipients' contact data.

Publish/Subscribe Options

- **Publish:** Select whether users with this access profile may publish messages or lists for other users.
- **Subscribe:** Select whether users with this access profile may subscribe to messages or lists other users have published.
- **Prevent Subscribers from Editing Messages/Stationery:** Prevents users from editing messages and stationery.

Contact & Field Options

- **Field Restriction:** Check this option and select data fields from the list to the right to give the user the ability to create dynamic lists and messages based on the fields they may access.
- **View Contacts:** This option allows user to view all of their viewable contacts.
- **Edit Contact Details:** Gives the user permission to update recipients' contact details like phone numbers or email addresses.
- **Associated Accounts Administration:** Allows user to change settings and options related to Associated Accounts.

Report Options

- **Create Reports:** Check this box to give the user the ability to create reports.
- **TIM Reporting:** Gives user access to Teacher-Initiated Messaging reports.

Monitoring

- **Event Monitoring:** Allows user to set up Broadcast event monitors.
- **System-wide Event Monitoring:** Allows user to set up monitors for certain Broadcast events sent by other users.

Systemwide View Options

- **System-wide Reports:** Allows user to see system-wide information when they view the completed Broadcasts page or when they generate a report from the Reports tab.
- **Usage Stats:** Select to allow the user to view the Usage Stats sub-tab.
- **Call Distribution:** Shows the distribution of calls over time.
- **Active Broadcasts:** Select to allow the user to view all Broadcasts currently running in the system.
- **Completed Broadcasts:** Select to allow the user to view all completed Broadcasts in the system.
- **Repeating Broadcasts:** Select to allow the user to view all repeating Broadcasts currently scheduled in the system.
- **Blocked Destination List:** Select to allow the user to view the system-wide blocked number list. If you select this option, you may choose the amount of access the user will have from the options below. The options are:

- **No Access:** The user may not access the blocked destination lists.
- **View Only:** Allows user to view blocked phone numbers or email addresses, but not edit the lists.
- **Add/Delete Own:** Allows user to add or delete blocked destinations, but they cannot delete destinations entered by any other user.
- **Add/Delete All:** Allows user unlimited ability to add or delete blocked destinations.

Quick Tip Tools

- **Topic Recipient:** Allows user to receive Quick Tip Messages. Note that users with this enabled will receive an email each time a tip is submitted.
- **Manage Topics**: Enables user to edit topic categories for Quick Tip messages.

Security & Administrator Controls:

- **Manage Users:** Check this box to allow users to create, edit, and delete User Accounts.
- **Manage Profiles:** Check this box to allow users to create, edit, and delete Access Profiles.
- **Manage System Settings:** Check this box to allow users to edit System Settings.
- **Manage All Broadcasts:** Select to allow the user to edit or cancel any Broadcast in the system.
- **Manage Data Imports:** Select to allow the user to configure, create, and delete data imports in the system.
- **Manage Field Definitions:** Select to allow the user to configure new fields in the system's database for data imports.
- **Manage Classroom Data:** Permits the user to edit the Classroom Messaging template and message categories.

User Accounts

Users may be created manually or through a data import. If you plan to restrict user access to data for only certain organizations, Broadcast types, or data fields, you should set up your data imports and job settings before creating user accounts. Also, be sure to create Access Profiles for your user groups before you create users.

Manually Adding a User

1. Click the **Admin tab**. The **Users sub-tab** is the first screen you will see.
2. Click the **Add New User button** to access the **User Editor**, which is described in the next section.
3. Fill in the user's information.
4. Select the appropriate restrictions for the user. Click **Done** to create the user.

User Editor Options

This section contains a description of the different fields in the User Editor. You can access the User Editor at any time by clicking the **Edit link** next to any editable user in the system.

Note: If you use a data import to create user accounts, only their password and PIN will be editable.

Account Information

- **First and last name** should be the user's name. This will be used to automatically populate certain fields for the user, such as the From Name when creating email messages.
- **Description** lets you optionally add a description of the user, such as job title.
- **Username and Password** are for logging into the web interface.
- **Phone User ID and Phone PIN Code** are for sending Broadcasts by calling in to the system. See the *Remote Telephone Access* chapter in the online help to learn more about this feature.
- **Account Email** is used for sending reports, populating the From Email when creating email messages, and retrieving/resetting lost passwords.
- **Auto Report Emails** are other email addresses besides the Account Email which should receive a report when this user sends a Broadcast.
- **Phone** is the user's direct access phone number.
- **SMS** the user's number that can receive texts.
- **Caller ID** is the default caller ID phone number for Broadcasts sent by the user.

Account Restrictions

- **Access Profile** is where you select the profile for the user.

- The **Broadcast Type, Survey Type,** and **Feed Category Restriction** checkboxes let you restrict the user to only sending certain types of Broadcasts.

Data View

- The **Staff ID** field is for the user's unique Staff ID. Restricting a user's access based on their staff ID number is only necessary if you are importing student schedule/enrollment data, which will include the ID number of the staff member assigned to teach each class section. If you are not importing student schedule data this should be left blank.
- The remaining fields are for restricting the user to viewing only certain types of data, such as only data from a particular school or grade.
- **Viewable Users** lets you select users whose Broadcast information should be shown on this user's Dashboard.

Data Imports

There are several types of data imports you can set up in the system depending on the options your system has enabled. This section will explain how to import contacts and users.

Data Import Overview

There are four basic steps to setting up a new data import which will be covered in this guide.

1. Create a CSV (Comma Separated Value) file of the data to be imported.
2. Configure any field definitions you'll need to be able to map your data into the database in the system.
3. Add a new import to the *Import Manager* and upload the CSV.
4. Map the data to the fields you created in step 2.

Types of Data Imports

There are two types of data imports by default, *Person* and *User*, which will be covered in this guide.

- **Person**: Person data is your recipient data, also referred to as system contacts. Their contact information can be accessed by all users of the system, data restrictions permitting.
- **User:** User imports let you set up and maintain user accounts by just importing user data.

Preparing the System for Your Data

Before you import data, you must configure the various import field definitions. These fields correspond to the types of data in your import. The system contains multiple classes of fields which are intended to be used with certain types of data. These fields are seen by users when performing activities such as creating lists or messages with data inserts.

The features discussed in this section are found under the **Admin** tab in the **Settings** subsection, shown below. This section will be primarily concerned with the links in the *System* column.

Field Definitions

Field definitions are for general metadata about each contact, such as name and language preference. This is also where fields for data like absence date or lunch balance should be defined. Note that some fields such as the phone, email, and SMS fields are built into the system and do not need to be defined here.

Group Field Definitions

Group fields allow you to specify up to ten fields of additional data for your contacts. For example, if your data contains after-school activities, you can create an After-school group field. All group fields are automatically created as searchable fields so they can be used to create lists.

Appointment Field Definitions

If enabled, you'll see a link to Appointment Field Definitions. Appointment fields are for general metadata about appointments, which the system will use to send appointment reminders to patients.

Organizations

Organizations are logical groupings of contacts by attributes such as school or building. For example, a school district is comprised of schools. The *Organization Manager* allows you to display and manage organization data in your account. Users and contacts should be associated with one or more organizations.

Organizations will be created dynamically when you import your contact data. Once you import your contact data you can use the Organization Manager to view and modify organization information such as changing an organization's description, deleting an organization or merging two or more organizations into another organization.

Configuring Field Definitions

This section will cover how to create a new field definition. With the exception of the field type which will be explained below, group field definitions work in the same way so you can use this section to help you configure both.

Important: Modifying data field definitions after users have started using your system may result in unintended consequences. Please contact support services for assistance before modifying your field definitions. *support@schoolmessenger.com* or 800-920-3897.

Note: The First Name, Last Name, and Language fields are defined by default and can't be deleted or edited in any way.

Note: Phone, email, and SMS fields are part of the system by default and do not need to be defined.

Creating a New Field

1. Click the **Field Definitions** link in the *System* column.
2. In the empty row, enter or select the following information:
    - **Field Number:** This is the field in the system's database that your data will occupy.
    - **Name:** This is the name that represents the data in the field. It is what users will see when they see this field in menus throughout the system.
    - **Type:** There are three types you can assign to your new field. These correspond to how and where the field will appear in the system. All of them are potentially available for creating dynamic messages.
        - **List:** List will list all possible values for the data field in a drop-down menu. This is good for fields such as grade which will have a limited number of values. Fields with the List

type are used to create rules throughout the system such as when creating lists, performing searches, or restricting users to certain data views.

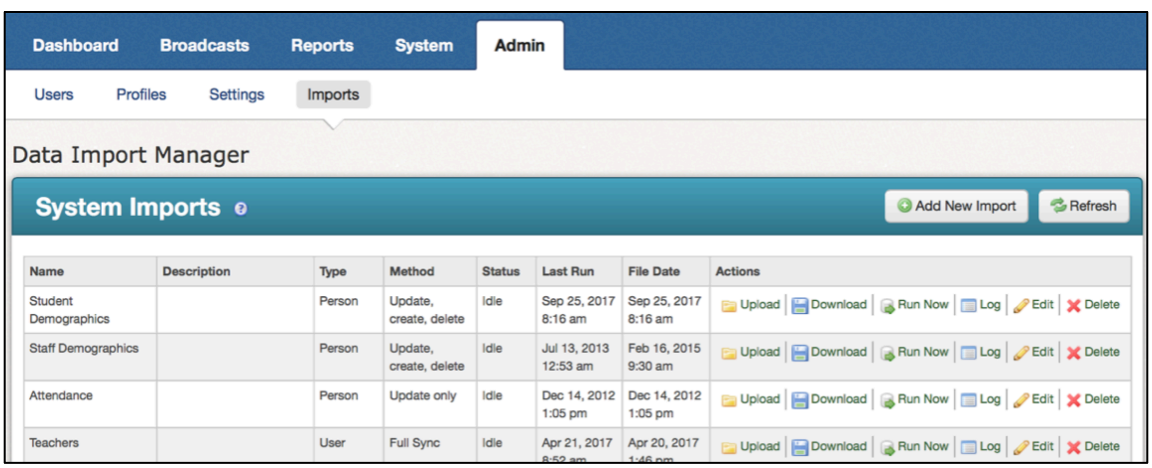
- ○ **Text:** Text is good for fields which will have many possible values such as first and last name. Fields with the text type are only used on search pages such as Quick Pick for adding individuals to lists.
- ○ **Date:** Defines data that contains a date, such as Absence Date.
- ○ **Numeric:** Numeric is for fields which will have many possible numeric values such as lunch balance.

- **Searchable:** Checking this box determines whether or not users will be able to search on this field, such as when creating lists. Not all fields should be searchable, only those which would be useful to search. Some fields might only be useful for inserting into messages in which case, they should not be searchable.

Note: Configuring a group field works in the same manner. Just click **Group Field Definitions** to add a group field. Group fields are always of the List type and are searchable by default.

Importing Contacts

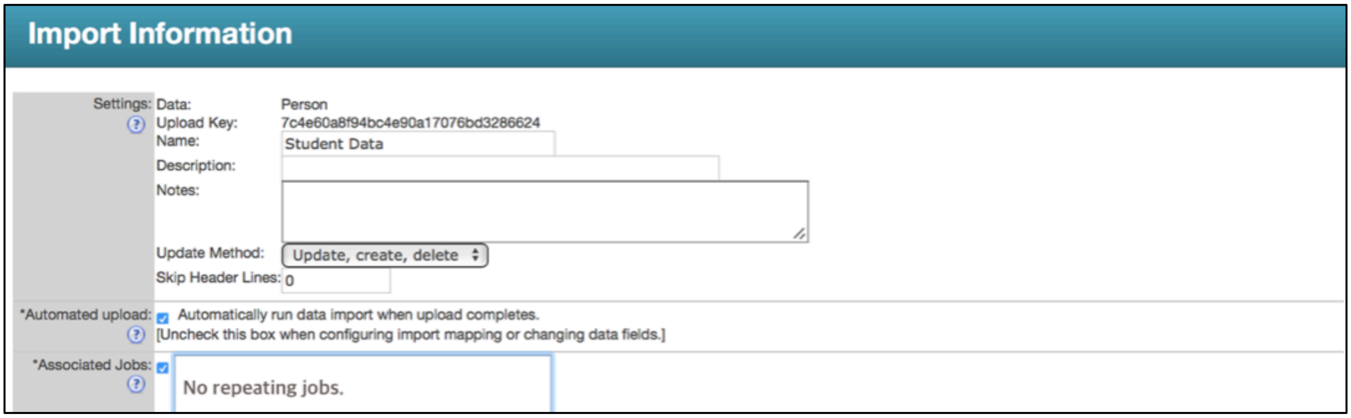
The features discussed in this section are found under the Admin tab in the *Import* subsection, shown below.



Note: This section assumes you have created a CSV file with your data and have also configured all necessary data fields.

1. On the Imports page, click the **Add New Import button**.
2. Select the *Person* data type and enter a name for the import. You may optionally add a description too.

3. Click the **Submit button** to continue to the Import Information screen, shown below.



4. If you'd like to enter any additional notes about this import, you can add them in the Notes field.

5. Select how you would like to update this data on future imports using the Update Method menu. Your choices are:

   - **Update only:** This will update existing information for people already in the system's database. If there are new people in the import or people missing from the import, they will not be added or removed from the system's database. Nothing new is created and only existing information is updated.

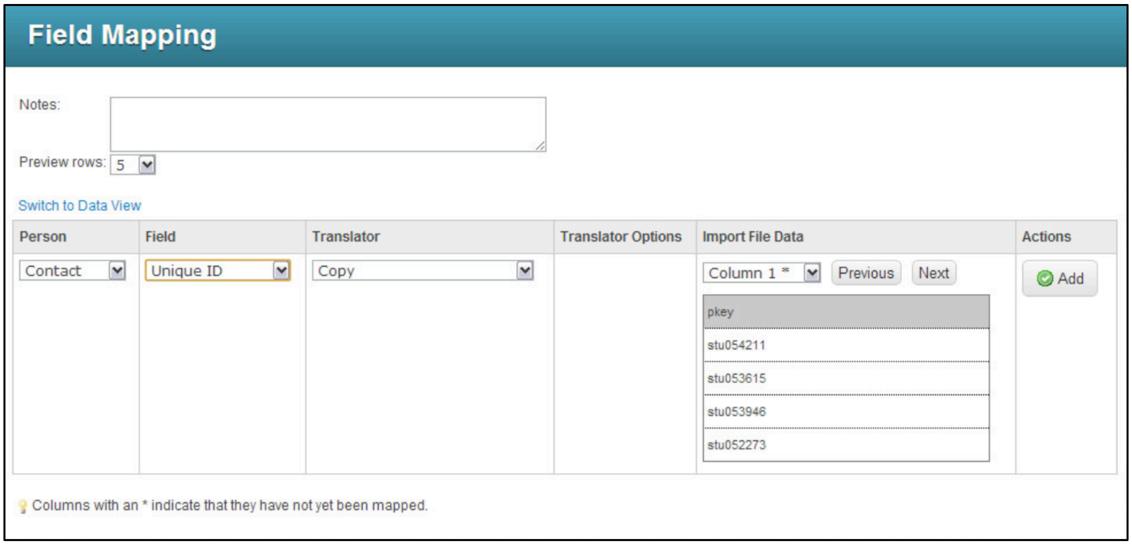
   - **Update & create:** This will update existing information for people already in the system's database and add any new people from your import to the system's database. If people are not in your import, but exist in the system's database, they will not be deleted.

   - **Update, create, delete:** This will completely synchronize the database with the data in your import. If there are people in the system's database who are not in the import's CSV file when the import is run, they will be deleted from the database. If there are new people in the most recent import they will be added to the system's database.

6. If your CSV file has header rows that should be ignored, enter the number of header rows in the Skip Header Lines field.

7. Click the **Submit button** to return to the Imports screen and click the **Upload link** next to the import in the list.

8. Click the **Choose File button** and select the CSV file from your computer, then click the **Upload** button. This will take you to the Field Mapping screen, shown below, where you can map the fields you've created to the columns of your CSV file.



9. All of the fields you've created will be listed in the Field dropdown menu. For each column in your CSV, select the appropriate field for the data. The translator dropdown lets you select a translator to format your data into the format required by the system. A description of the available translators is listed below.

10. Click the **Add button** to add the mapping and start a new row of mappings.

11. When you're done, click **Submit and Run Now** to upload your data to the system immediately. If you want to wait and run the upload later, just click the **Submit button**. Your mappings will be saved and you will return to the Imports screen.

Note: Your settings will be saved for future imports and only need to be changed if your source file layout changes.

Patient Imports

If you have Events enabled, you'll need to import patient data to send appointment reminders. Appointment reminders need both a patient data import and an appointment data import. Your CSV file can contain both person and appointment data. Simply use the same CSV file for both the person import and the appointment import.

For medical person imports (patients), ensure the following:

- The person type should always be "Contact" for all fields.
- The field "Unique ID" should always be present, and map to the unique person key.
- Map all contact info (phone, email, sms) as appropriate.

- The field defined as the "Organization" Display Name should also be present. The name you define here should be present in the drop-down in the "Field Column" so you can select it.

Translator Types

- **Copy:** Maps the exact value from the import file into the database without modifying the data.
- **Static Value:** Maps the specified value into the database for every contact record. For example, you may want to specify a contact type "Student" for all student records.
- **Current Date:** Automatically inserts the current date for every record.
- **Numeric:** Converts the data to a numeric value, removing any non-numeric characters.
- **Currency with Leading Zero:** Automatically converts numbers into standard currency format, but puts a zero value for dollars when the amount is less than one dollar.
- **Currency:** Automatically converts numbers into standard currency format. For example, $05.27 would be converted into $5.27.
- **Date:** Converts common date formats into MM/dd/yyyy format. When you select this translator, you will need to specify what the date format looks like in your data. For example, if your data includes the date in yyyy/MM/dd format, specify this in the options for the Date translator which can then transform the data into MM/dd/yyyy format that the system requires.
- **Data Lookup:** Maps specific input values to specified output values. For example, converting school numeric codes into descriptions such as 027=Springfield High School.

Verify Your Import

After your import has finished running, you can verify that your data imported correctly by going to the **System** tab and clicking on **Contacts**. From here, you can view all of the contacts in the system or create filters to view specific sets of people.

Importing Appointment Data

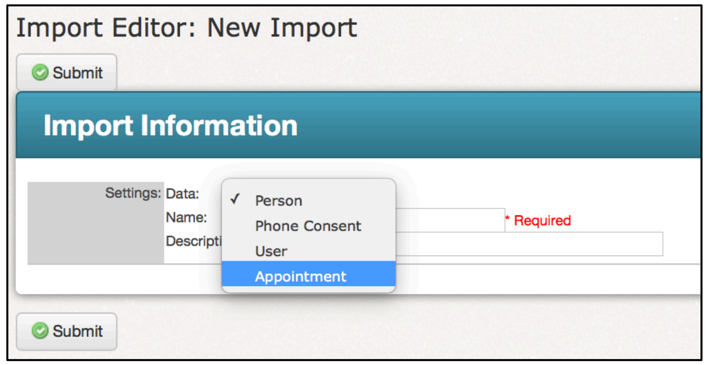
If your organization has Events enabled, you'll need to import patient and appointment data to send appointment reminders. Appointment reminders need both a patient data import and an appointment data import.

You will need to create two imports: one to import persons (patients) and the other to import appointment data.

Always run the person import first.

Your CSV file can contain both person and appointment data. Simply use the same data file for both imports. The person import will refer to the columns that are person-related, and the appointment import will refer to columns that are appointment-related. There are few which apply to both, as mentioned below.

To begin, click the **Admin tab** and then the **Imports sub-tab.** Click the **Add New Import button,** select the Data type as "**Appointment**" and enter a name and description.



The ensuing "Import Information" screen works similar to person imports. Note that appointment imports support all three update methods similar to persons, and the semantics are similar.

Click the **Submit button** to save and return to the Data Import Manager screen.

Mapping The Fields

After the import information is uploaded, you'll enter the "Map Fields" screen as normal to define your import columns.

1. Map the required field "Person ID" to the appropriate column containing the person key. This is critical to associate the appointment with the person data created in the person import above.
2. Map the required field "Appointment ID" to the appropriate column containing the unique appointment key.
3. The field defined as the "Organization" Display Name is also required. The name you define here should be present in the drop-down in the "Field Column" so you can select it.
4. The "Appointment Date/Time" field is also required. See the next section (Importing Appointment Date and Time) for how to set this up, along with other considerations.
5. Map the recommended fields as appropriate: Location Address, Location Email, Location Number, Provider.
6. Map the supported fields as appropriate: Notes, Display Date and Disposition (if applicable).
7. Map any other custom appointment fields you have defined as appropriate.

Time Zones

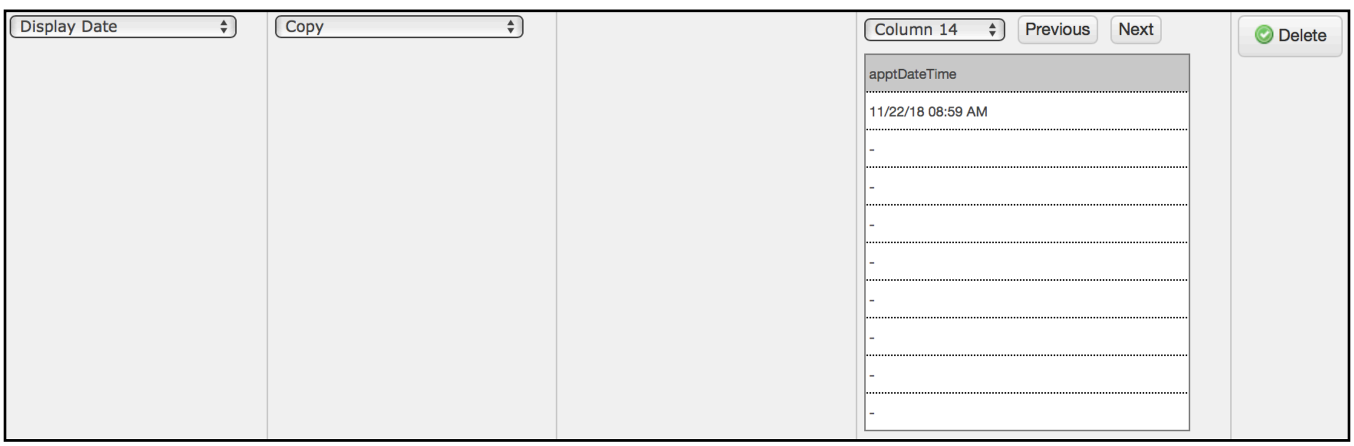
If a time zone is not present in the input stream, it will default to the overall customer time zone setting when converting. For those clients who may have varying time zones in their input data, you should declare an translator date/time format that includes it, and then make sure your data includes it consistently.

Here's an example: A format of `MM/dd/yy hh:mm a zzz` will accept data `03/30/18 08:59 AM PST` and `05/03/18 08:59 AM PDT.`

Display Date

As previously mentioned, often the requirements for the timestamp import above enforce a format that is not conducive to announcing over the phone. If that's not true for you, add the import field as follows:

1. Select the **Display Date field** according to whatever you named that field during the Appointment Field Definition step.
2. Choose **Copy** as the translator type.
3. Simply point it to the same column as your timestamp import. Basically, the import swallows the same data, but this time as a pure text field that it will use text-to-speech to convert when rendering the phone message.



However, if you'd like to use a different format, you'll need to create a separate column and point your "Display Date" import to that column instead. You'll typically copy this field over as pure text. Note that unlike appointment imports, the format **can vary from record to record** since it's being treated as pure text.

If your original source data is an excel spreadsheet, typically you can use EXCEL date/time format functions to generate this column based on some EXCEL format formulas from the original date/time field.

Importing Users

Importing users works almost exactly like importing contacts. You should follow the same instructions, but with the following exceptions:

Important: If you have already created Access Profiles, make sure to specify the profile for each user in exactly the same way (spelling and capitalization) in your CSV. If you haven't, the Access Profile will be created automatically with no options selected and you'll need to edit it after the import.

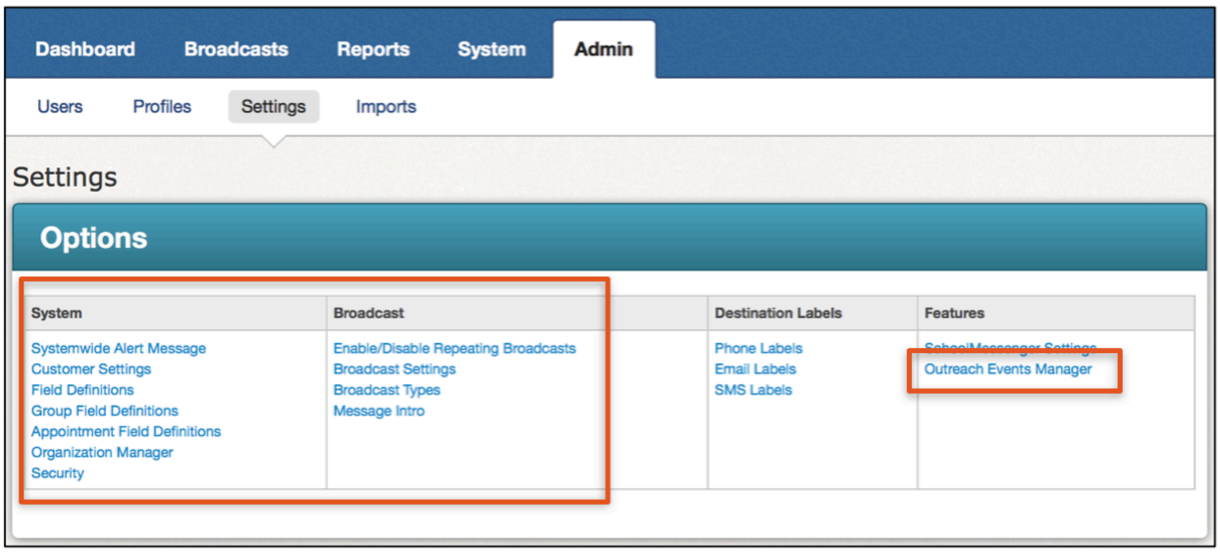
Note: After the import, users can request a new password at the login screen. The system will email the user to initiate the process of resetting their password.

1. Create a CSV file with your user data. This should include *at least* the following fields:
   - Username
   - First name
   - Last name
   - Email address
   - Phone number
   - Phone user ID
   - Access Profile
2. Select the *User* data type instead of *Person* in step 2.
3. You will have different options to choose from for the Update Method in step 5. They are:
   - **Full Synchronization**: This will completely synchronize the database with the data from your import. Users whose accounts were created by a particular import must be included in that import each time it is run. If they are not included in the import, their accounts will be disabled. If there are new users in the most recent import, accounts will be created for them. Using this option will cause the data to be read-only, but the password and PIN code may be changed. Information like the user's name or phone number may only be updated by updating the data in the user import and running it again.
   - **Create Only:** This will create any new accounts included in your data, but will not affect any accounts that already exist in the system. If there are accounts in the system which are not in the import's data, they will not be disabled.

Other Useful Features

There are a few more administrative features you should be aware of in the system.

The features discussed in this section are found under the Admin tab in the Settings subsection, shown below.



Note: If your system has additional features enabled such as Classroom Messaging or social media, administrative options for these features will be found primarily in the Features column.

Systemwide Alert Message

Systemwide Alert Message in the System column lets you display a message to users which will appear at the top of every screen. The alert appears as black text in a bright red box.

Customer Information

The *Customer Information* link in the System column lets you enter the display name which will appear at the top of every screen. It also lets you specify your local area code. If your system is restricted to sending messages only from specific email domains, you can view them here.

Note: If you want to remove or configure additional email domain names, please contact support.

Security

The **Security link** in the System column contains some tools for enforcing certain security enhancing rules.

- **Minimum Username Length & Minimum Password Length:** Prevent users from creating tiny usernames and passwords.
- **Invalid Login Lockout:** Set how many times a user can attempt to log in before the system locks them out. Setting this to 0 will cause the system to never lock out a user after a failed login attempt.
- **Invalid Login Lockout Period:** Choose how many minutes a user will be locked out after triggering the Invalid Login Lockout.
- **Invalid Login Disable Account:** Select how many times a user can attempt to log in before their account is disabled.
- **Require Student ID on Call Back:** Check this box to require message recipients to enter a valid student ID when retrieving messages.

Enable/Disable Repeating Broadcasts

The *Enable/Disable Repeating Broadcasts* link in the Broadcast column allows you to turn off all repeating Broadcasts in the system. You can also easily restart them again from this link too. This is useful for disabling repeating calls such as attendance messages for long breaks.

Broadcast Settings

If your system is configured to allow recipients to call back to retrieve messages, the Broadcast Settings link in the Broadcast column will just show the default Caller ID which may only be edited by calling support.

If your system does not allow callbacks, you may edit the default Caller ID here. You may also restrict users to using Caller ID numbers from an approved list of numbers.

Message Intro

The **Message Intro link** lets you preview and change the introduction message which plays before every phone message.

Outreach Events Manager

Appointment Reminder scheduling is done through the Outreach Events Manager. To begin, click the **Admin tab** and then the **Settings sub-tab**. Under the *Features* section, click **Outreach Events Manager**.

Questions?

If you have any questions regarding the above, please contact support.

SchoolMessenger Support Number

Email: support@schoolmessenger.com

Phone: 800-920-3897

Chat live with a support rep here:

www.schoolmessenger.com/support