

School Messenger – How-To upload Destiny overdue and send a message home.

The basic steps you will follow are below:

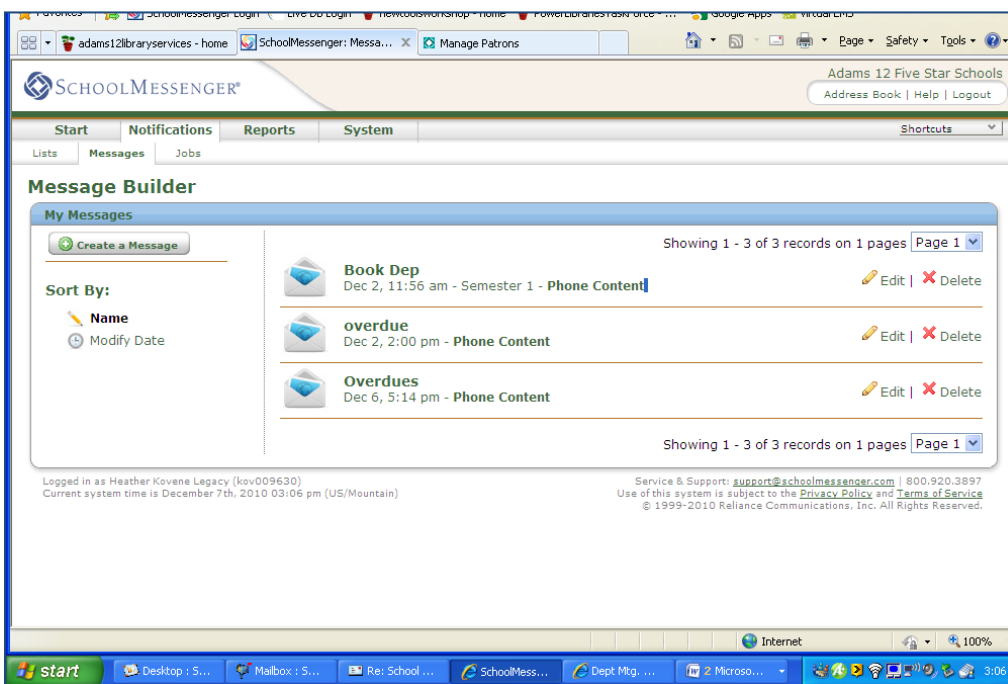
1. Insert your phone and email messages into School Messenger English and Spanish (you will do this just once) and set up your report. (*see #4 below as another option for setting up your report)
2. run the proper Destiny overdue report
3. upload your Destiny .csv file to School Messenger (or send to proper SM person)
4. Use School Messenger Easy Start option School Messenger to call/email home. *You can also insert your email and phone messages using the Easy Start option.

The steps you follow in detail:

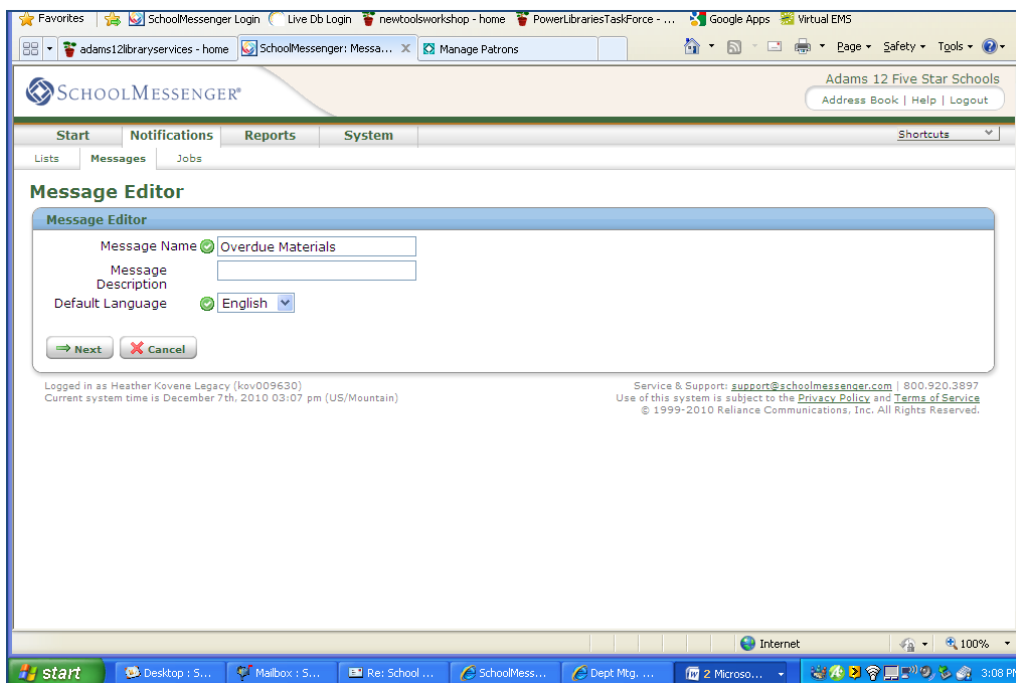
Get Started

1. School Messenger – Add your phone messages and email

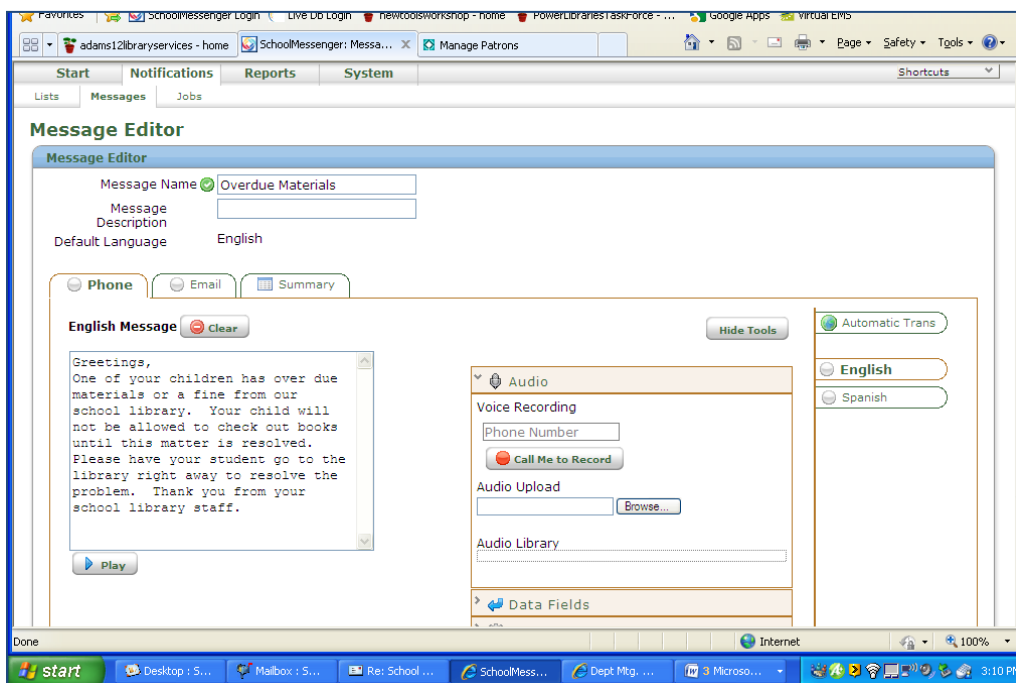
Click on the Messages tab under Notifications Tab. Click the Create a Message button.



Type a name for your message. Click the Next button at the bottom.



On the Message Editor screen, type a name for the message. Enter the text of your email message in English. Then, Record your voice for the telephone message **in English**. If you do not record your voice, the message you typed will be read by a computer voice when the phone is answered. *Be sure to PLAY the message to hear that the computer voice reads it correctly. You must type overdue as two words: over due, or she can't say it.



Now, click the Spanish tab on the right. First, Paste the text below into the Spanish email message area. Next, browse for the .wav file recorded by our District Interpreters to upload it (sent to you from Kim in email at your request). When you have all messages uploaded, click the Done button at the bottom. Put your message in SM, and know you can always Edit later.

Hola,

Su hijo tiene libros que entregar o multas en la biblioteca de la escuela. Su hijo no podrá tomar libros prestados hasta que se resuelva esta situación. Por favor, pida a su hijo que visite la biblioteca para resolver este problema. El personal de la biblioteca le agradece su atención. Gracias.

*Note: you could put your school name in place of “la escuela” in the first line. So it may read “de Rocky Mountain Elementary”

Below is the message above in English:

Hello,

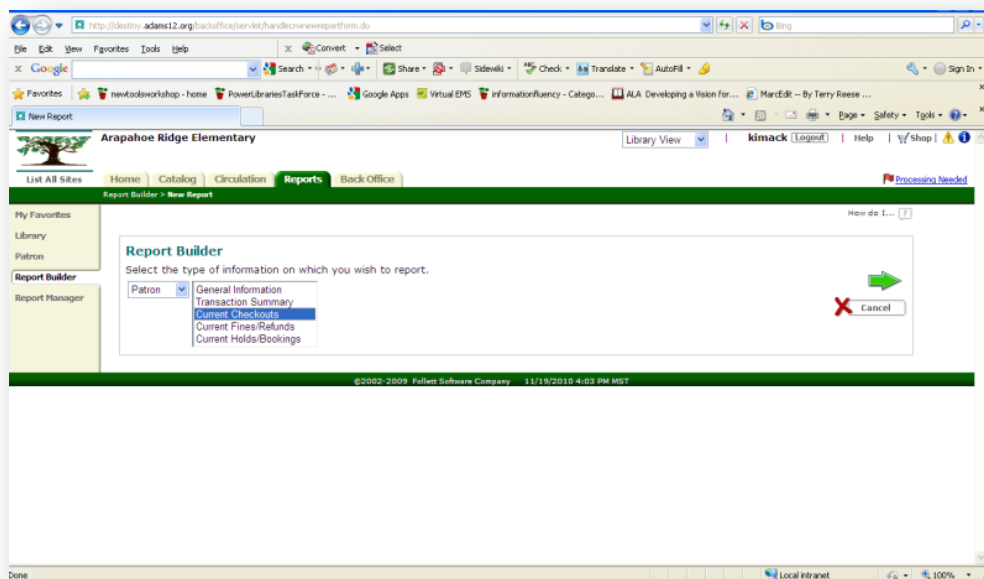
Your child has overdue materials or a fine from our school library. Your child will not be allowed to check out books until this matter is resolved. Please have your student go to the library right away to resolve the problem. Thank you from your school library staff.

FYI – School Messenger has a field that defines the language preference of each family. If the preference is English, they will receive your message in English. If it is Spanish, they will receive the message in Spanish. Just load both messages and let it send the right one.

2. Run the Destiny Barcode only report for Overdues:

Go to the Report Tab, then Report Builder on the left. Click New Report (top right)

Choose Patron, then Current Checkouts, then click Green Arrow on right.



Patron - Current Checkouts Report: Overdues for Auto Dialer

Step 1 of 7: Choose the information you wish to include in your report.

Patron Information

☐ Barcode - Patron ☐ Homeroom ☐ OverduePeriodTeacher

☐ Birth Date ☐ Name - First ☐ Patron Type

☐ Date Added/Updated ☐ Name - Last ☐ Status

☒ District ID ☐ Name - Middle ☐ User Defined 2

☐ Gender ☐ Nickname ☐ User Defined 3

☐ Grade Level ☐ Note - General ☐ User Defined 4

☐ Graduation Year ☐ Note - Important ☐ User Defined 5

Current Checkout Details

☐ Barcode - Copy ☐ Due Date ☐ Replacement Price

☐ Call Number/Location ☐ ISBN ☐ Title

☐ Checked Out ☐ Property Of

☐ Collection Type ☐ Purchase Price

Contact Information

☐ Email 1 ☐ Primary Phone 2 ☐ Secondary Phone 1

☐ Email 2 ☐ Primary Postal Code ☐ Secondary Phone 2

☐ Primary Address ☐ Primary State/Province ☐ Secondary Postal Code

☐ Primary City ☐ Secondary Address ☐ Secondary State/Province

☐ Primary Phone 1 ☐ Secondary City

On Step 1 of 7, under Patron Information, click the **District ID**. (Do not select Barcode) Don't select anything else. Click the Green Arrow.

Click the Green Arrows to bypass steps 2, 3, 4, & 5.

On Step 6, choose the drop-down arrow on the first Report Limiter. Select Due Date, then use the calendar to select today's date. This will run the report to show all books due before today (those that are overdue as of today). Next.

Patron - Current Checkouts Report

Step 6 of 7: Set up limiters to indicate which records you want to include and/or exclude from your report.

Report Limiters

Due Date less than 11/19/2010 AND

-- None --

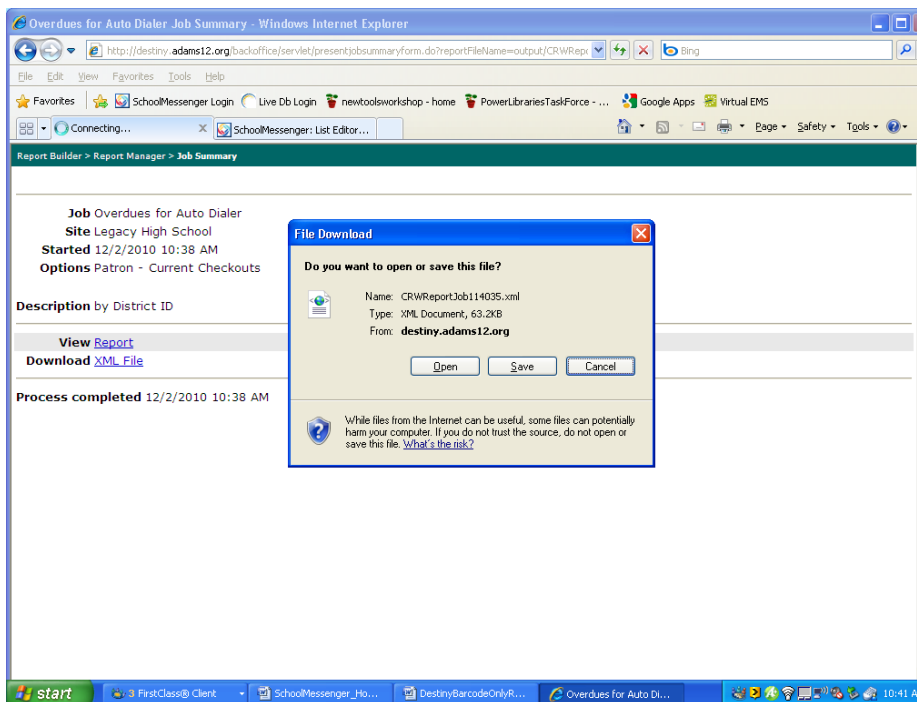
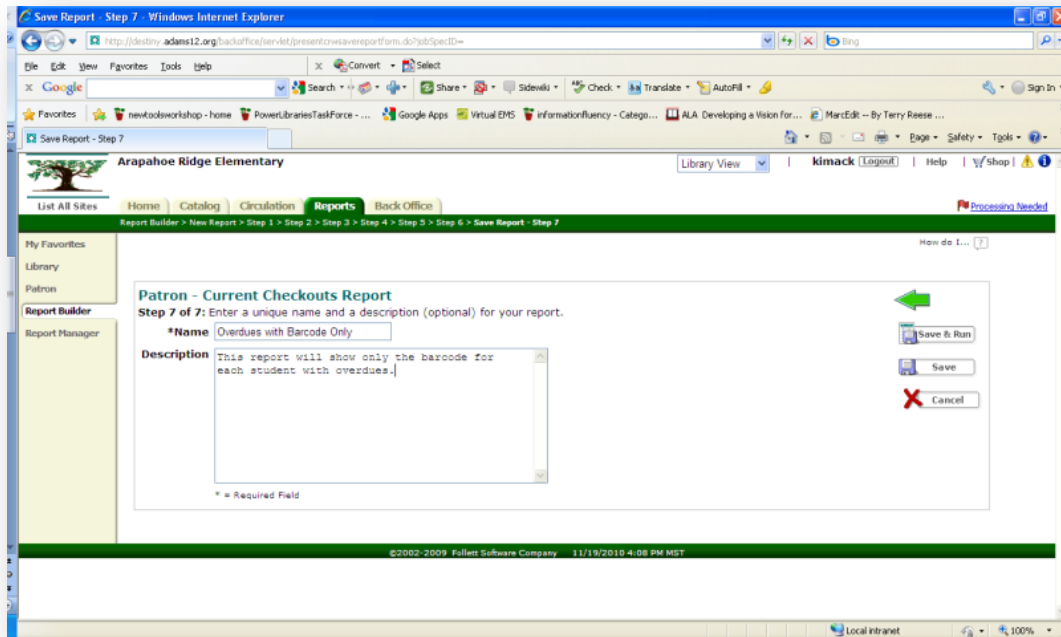
-- None --

-- None --

-- None --

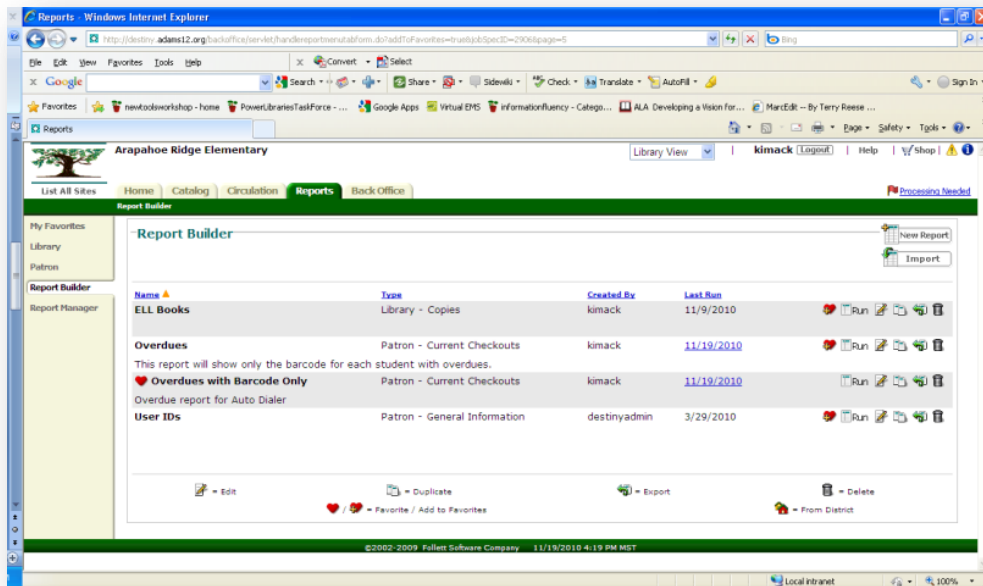
[Add Limiter](#)

Screen below shows: Name your report and write a description. Then click Save & Run button.



The report will show up just like any Destiny report. Click Refresh List until you see Status: Completed and you get the link to View.

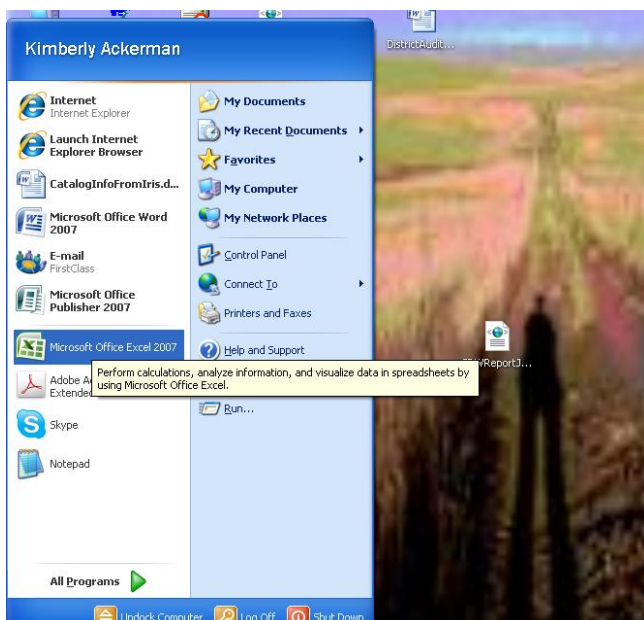
Click the **Download** link XML File. **Save** the file to your desktop.

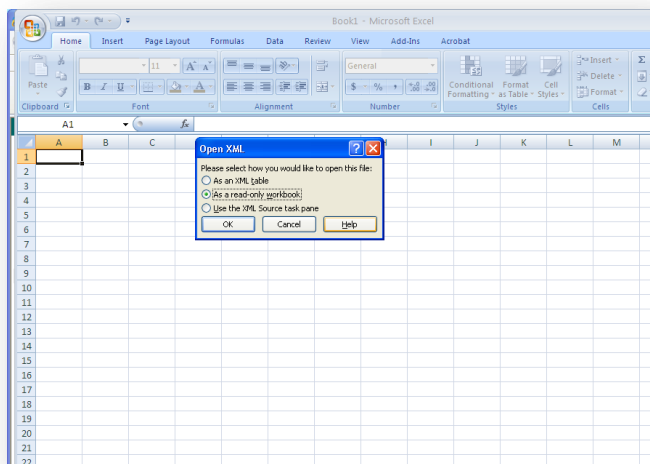


Do you want to save this report in your Favorites? Click on the breadcrumb back to Report Builder. You will see the report you just ran. Click the red heart on the right. The Heart will move to the beginning of your report, which shows you it is now in your Favorites. When you click My Favorites on the left, the report is always there.

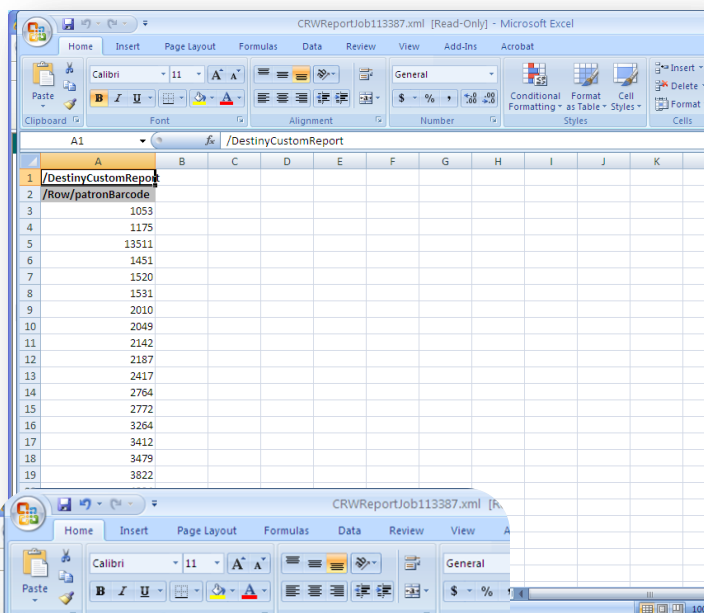
Now that the Destiny Barcode Only report is saved to your desktop, you have to do a couple of things to it to get it ready to import into School Messenger.

Open Excel. In Excel, go to OPEN and browse for the .xml file on your desktop. Open that file in Excel. On my desktop, you can see the saved .csv file which I'm going to open in Excel.





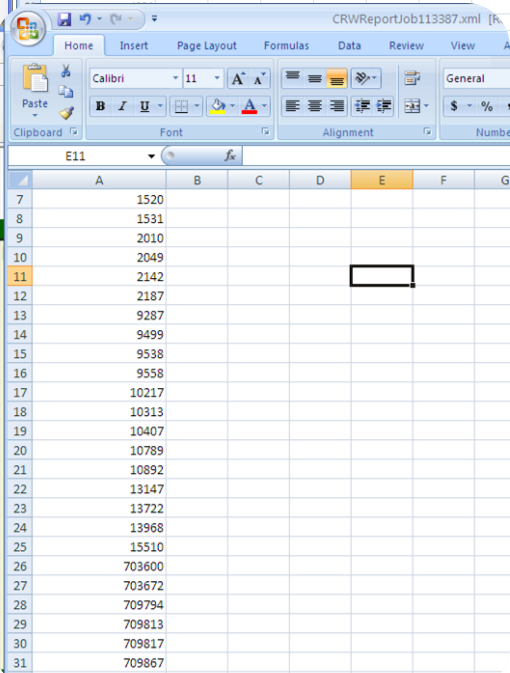
You will have the choice of how to open the file.
Choose As a read-only workbook (middle choice).



Your results will have some words in the first two rows. Click on the row # to highlight the row and press your Delete key on your keyboard to get rid of the words.

You have edited the file to get rid of everything but the barcodes.

Save the file again but choose to save it as File Type .CSV.



That file is ready to be imported into the auto-dialer. If someone else in your school will put it in the auto-dialer, save it in a place that will be accessible to the person who runs School Messenger, as she will have to import the file.

If you will adding it to the auto-dialer, save it wherever you want.

*An observation about the barcode report I ran for Legacy:

The leading zeroes are missing from the excel spreadsheet (that's OK). I found that any of these ID#s that are 4 digits or 5 digits belong to staff. Anything with 6 digits belongs to a student.

School messenger will skip any barcodes that belong to staff. So you will get some skipped records that School Messenger can't find a phone number or email for. These are either students who are no longer at your school, or they are staff members.

Example of Unmatched ID#s in School Messenger. You can search these in Destiny to see who the number belongs to. You can also search it in IC. If the number belongs to a student who is no longer active or who has no home information in IC, you will get the Status ****Not Found****.

SchoolMessenger: Upload List: Overdue Library Books 11/30 - Windows Internet Explorer

https://asp.schoolmessenger.com/adams12fivestarschools/uploadlistpreview.php

File Edit View Favorites Tools Help

Renew SchoolMessenger: Upload...

Lists Messages Jobs

Upload List: Overdue Library Books 11/30

Save Select Different File Cancel

Unmatched ID#s

ID#	Status
709794	### Not Found ###
709813	### Not Found ###
709867	### Not Found ###
709869	### Not Found ###
710087	### Not Found ###
710225	### Not Found ###
710311	### Not Found ###
710598	### Not Found ###

Matched ID#s

ID#	First Name	Last Name	Phone Number
703600	Amanda	Pfister	(303) 252-9084
703672	Scott	Bryant	(303) 464-0800
709817	Stephanie	Silva	(720) 224-1331

Please review your list then click Save.

Save Select Different File Cancel

Logged in as Heather Kovene Legacy (kov009630)
Current system time is November 30th, 2010 10:33 am (US/Mountain)

Service & Support: support@schoolmessenger.com | 800.920.3897
Use of this system is subject to the [Privacy Policy](#) and [Terms of Service](#)
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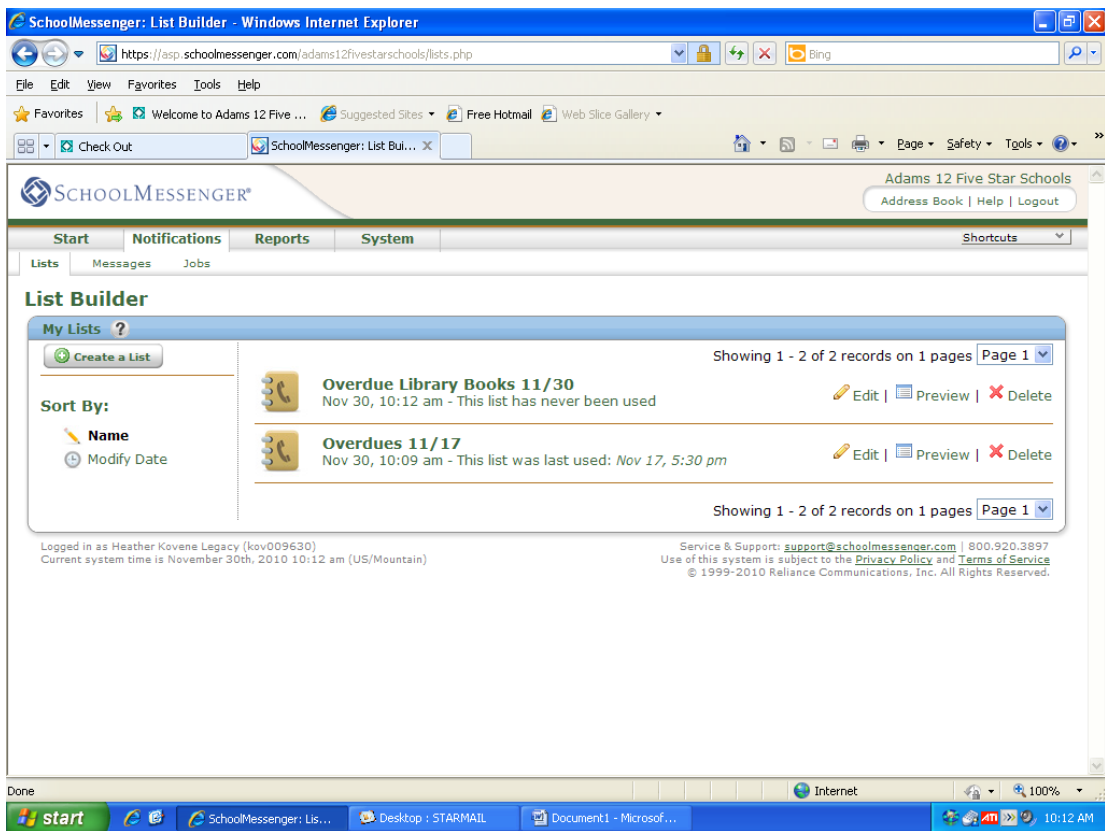
Done

start SchoolMessenger: Up... Infinite Campus - Win... 2 FirstClass@ Client Document1 - Microsof... 10:39 AM

3. School Messenger – Upload your overdue list from Destiny

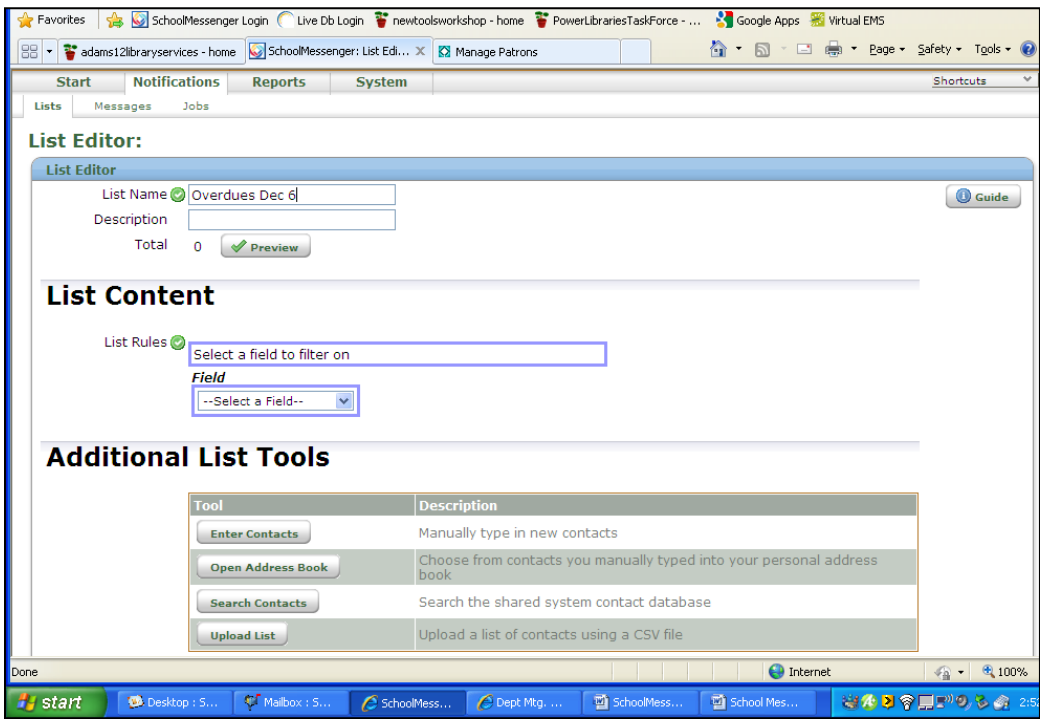
In School Messenger, Click on the Notifications Tab, subtab Lists.

You are going to Create a List. See button on left.

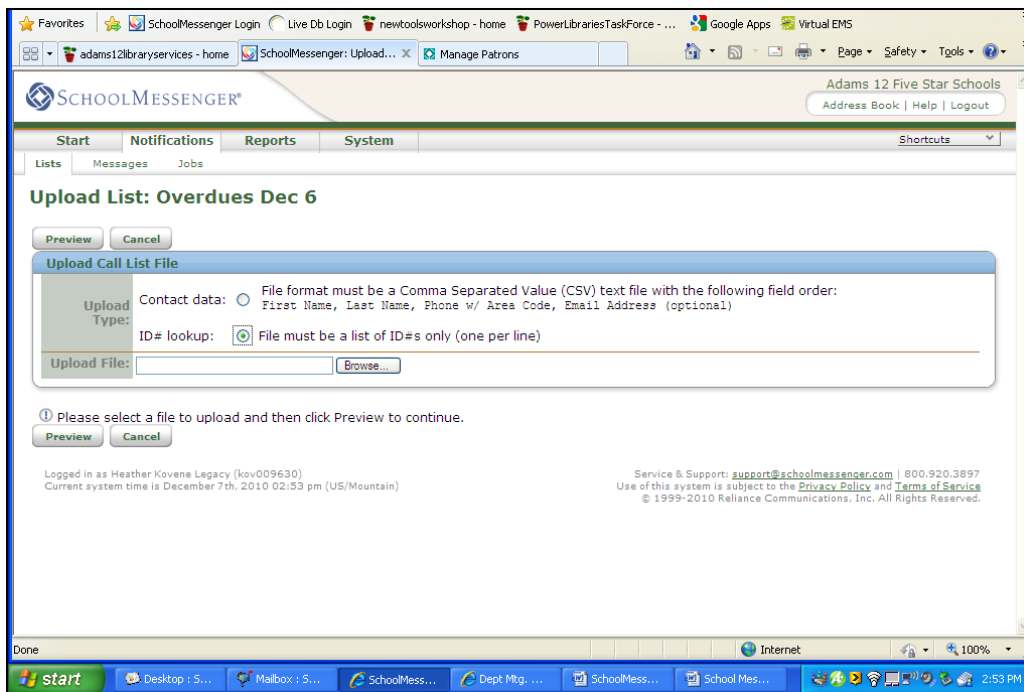


Name the list (this will be a Destiny list of the students who have overdues for a given date)

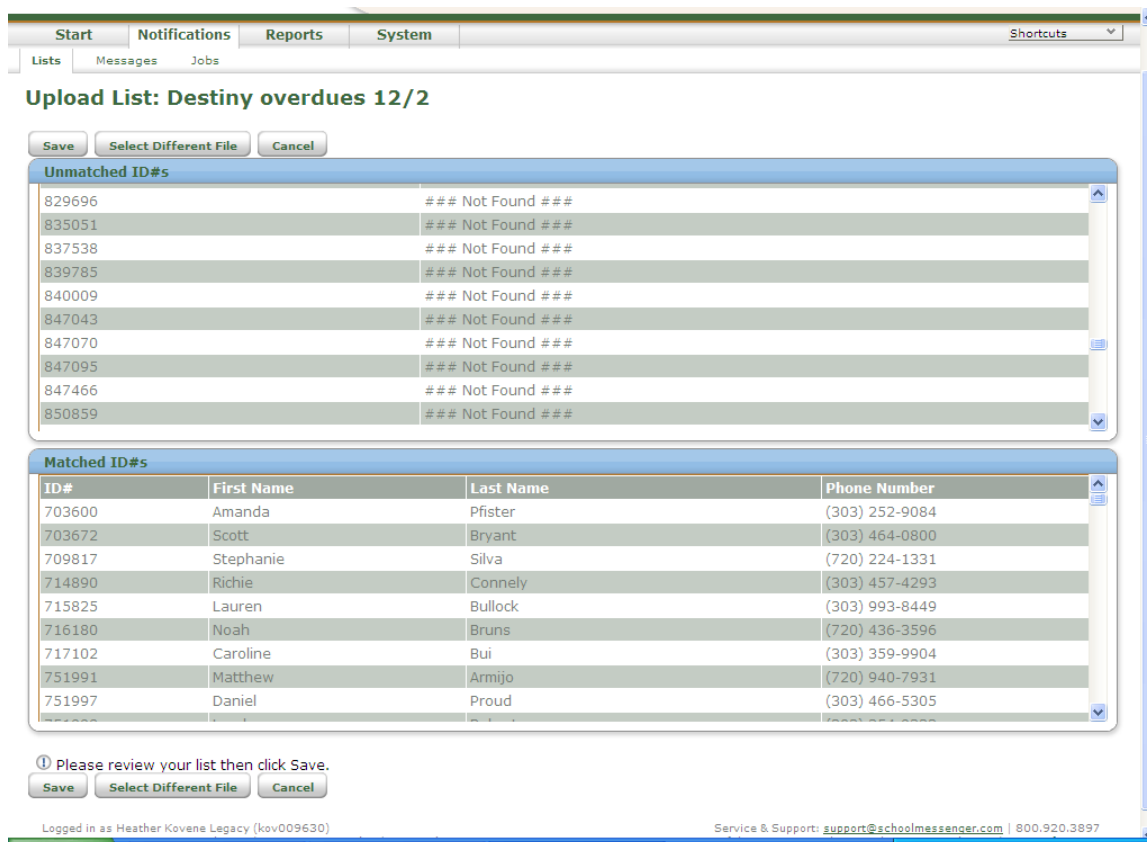
Under **Additional List Tools**, click the bottom button, Upload List.



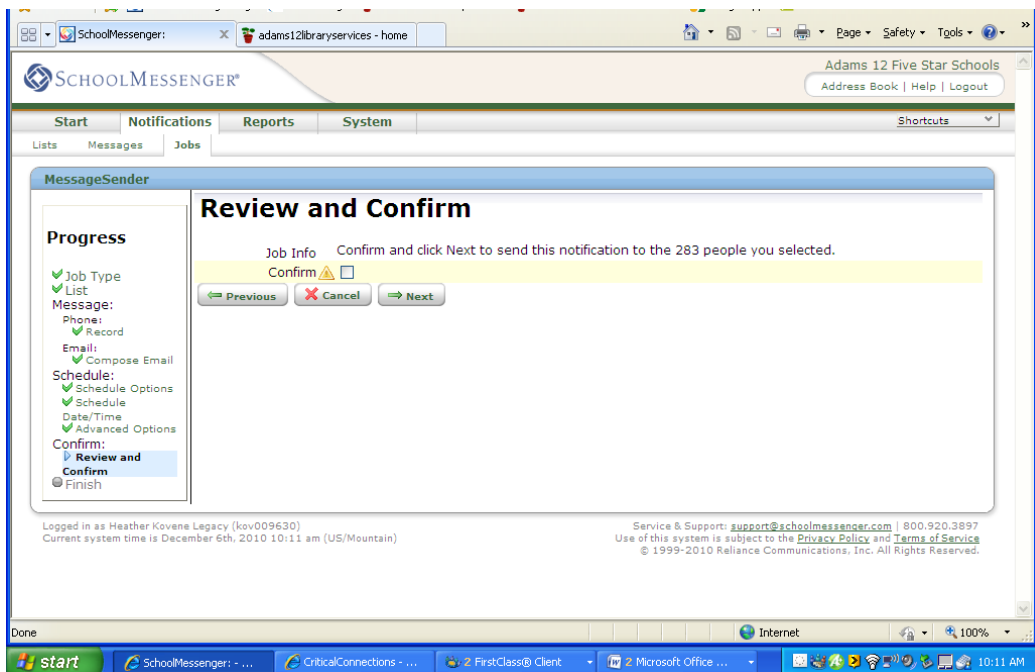
On the Upload List screen, click ID# lookup (second button). Browse for your .csv file on your computer and upload it. Use the Preview button at the bottom of the screen to preview the list.



If you don't see your student names in the Matched ID#'s box or you make a mistake, Click the button above for Select Different File and try again.



That file is now stored in School Messenger. When you go to EasyStart to set up this job, you will click the button next to that file to send it out.

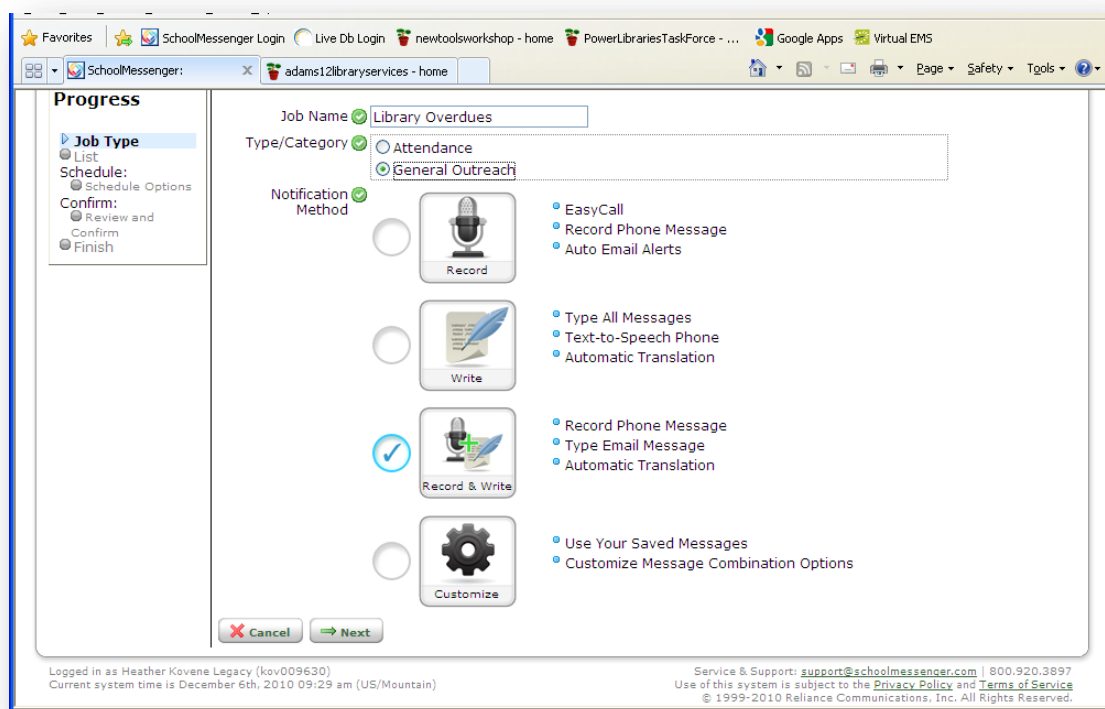


4. Set up School Messenger to notify parents using Easy Start option

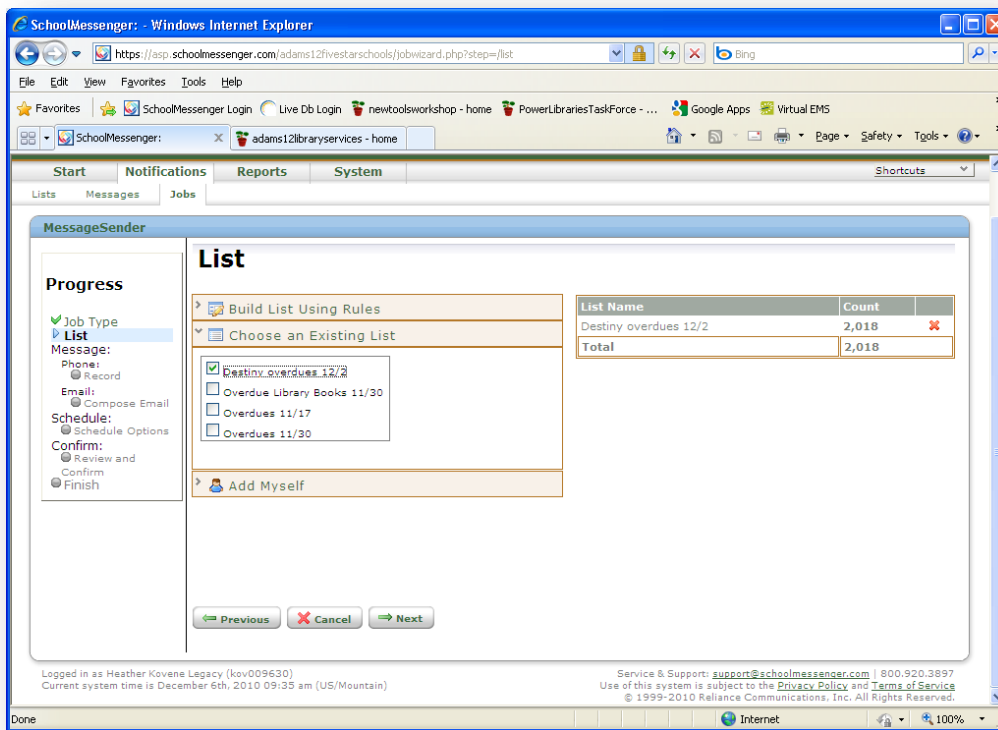
In School Messenger, Go back to the START tab and find the EASY START button on that page:

Fill in Report Title and check General Outreach button.

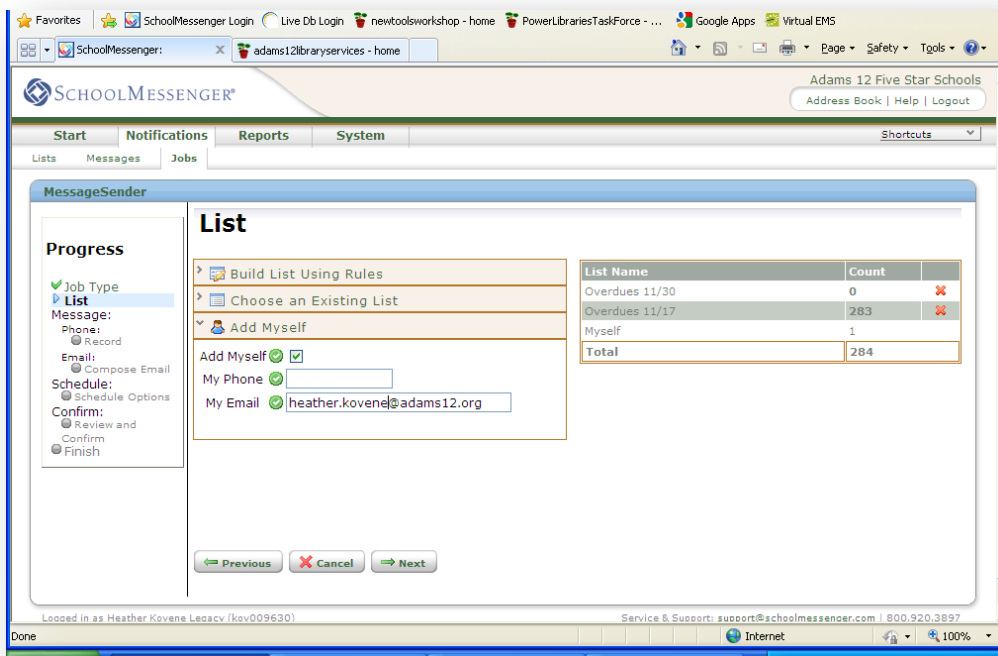
Check the third option – Record and Write. Here you record your voice on the phone message and you type an email message. Do not use their translation service.



On the List screen, Click Choose an Existing List and pick the list you've uploaded into School Messenger. Look at the box on the right to make sure you are going to send to only the correct list!

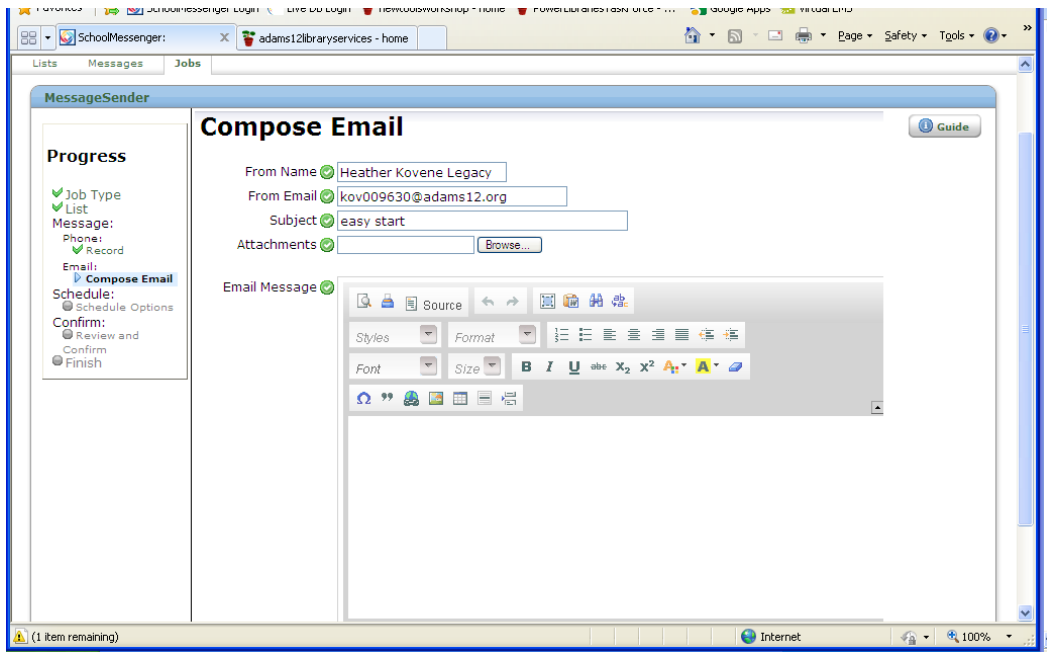


The Add Myself option lets you put in your email and your library phone number so you will get the message you send out to your parents each date it goes out.

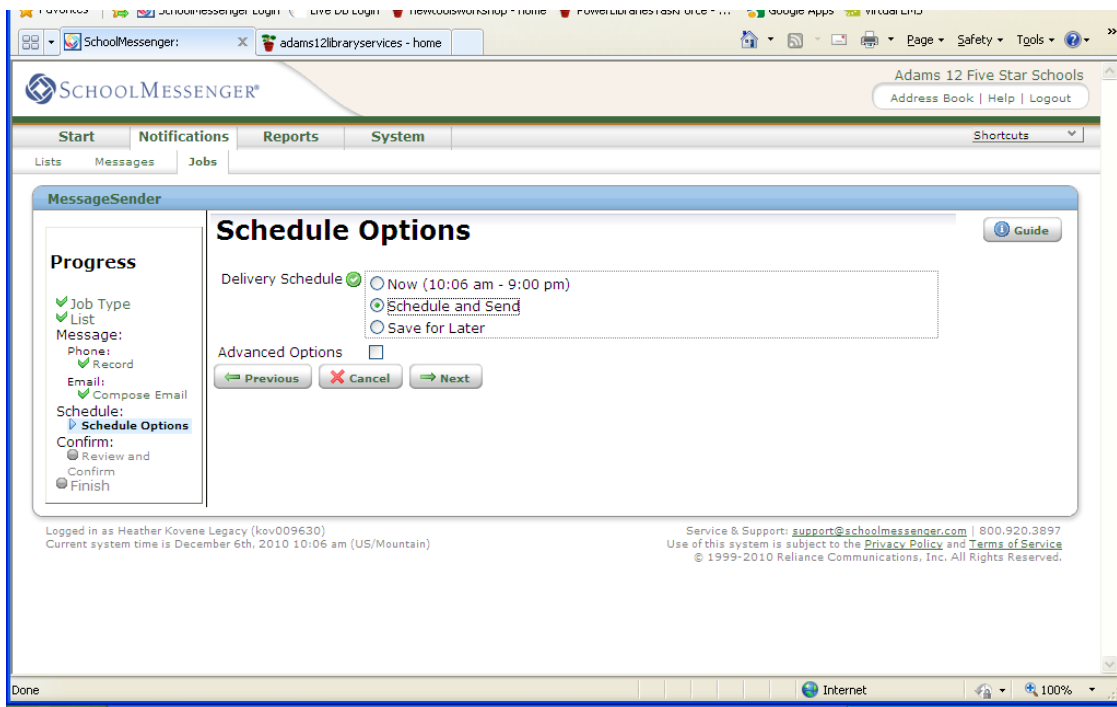


Next, record your phone message.

Then, either type in the email message or upload it from a file on your computer.

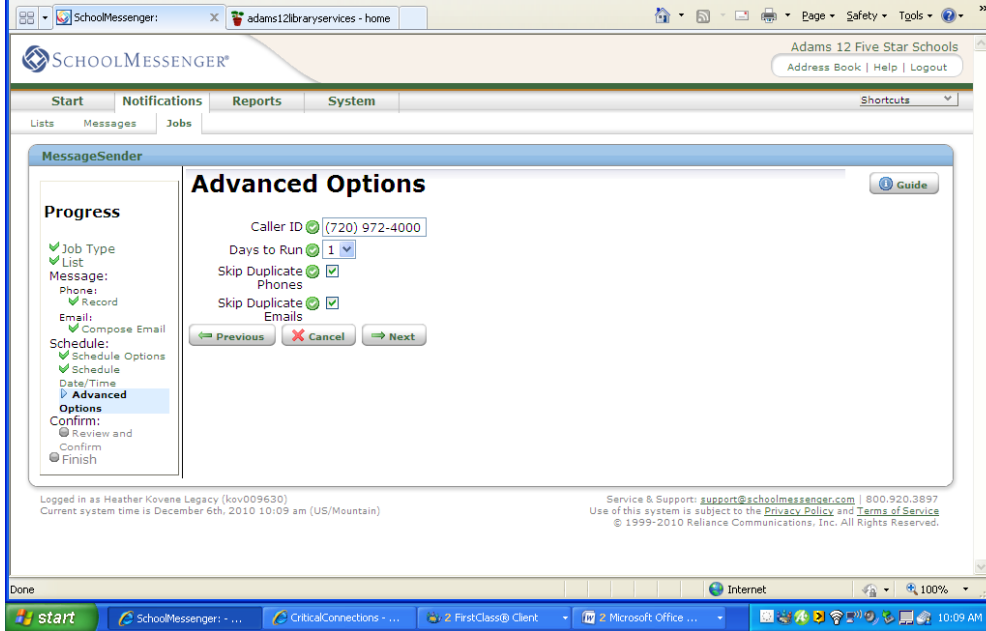


Next, Click Schedule and Send, then click Next.



Enter the DATE you want it to run and the TIMES you want it to run. Click Next.

Change the default phone number to your Library phone number, so you get the calls.



Leave the duplicates options checked.

Review and Confirm your job. If it is correct, click Confirm and then Next.

Hooray! School Messenger is now set up to call and email overdues home.