Survey Messenger

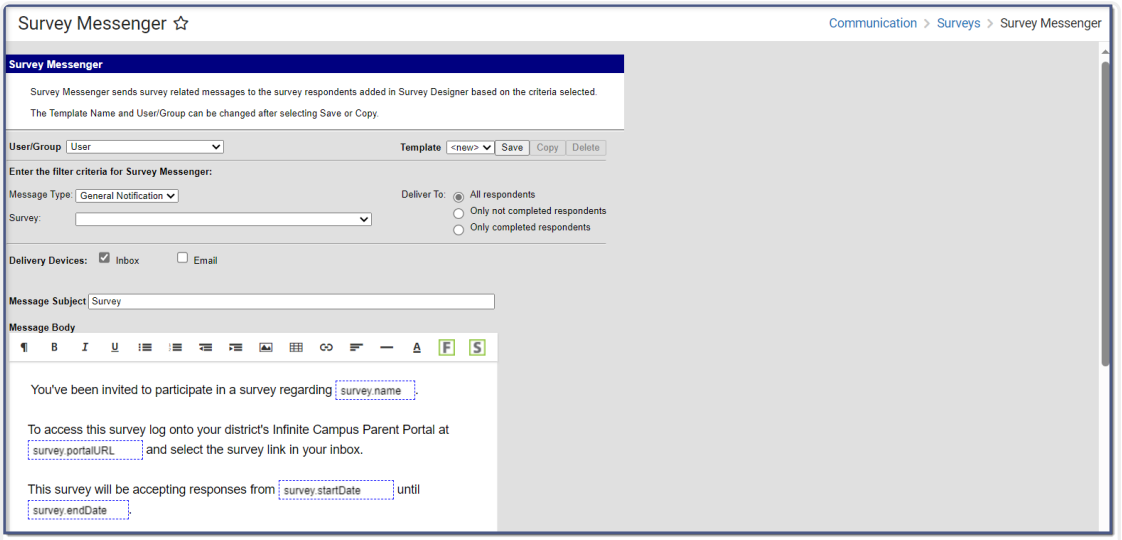
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Tool Search: Survey Messenger

> The voice and text message features described in this article apply only to schools/districts that use Campus Messenger with the Voice add-on.

Survey Messenger allows users to send mass portal, email, voice, or text notifications related to a survey created in the Survey Designer tool. Survey Messenger is often used in the following scenarios:

- To notify intended survey recipients that the survey is available.
- To request that survey recipients who have not yet responded complete the survey before the deadline.
- To confirm reception of completed surveys.



Survey Messenger

> See the Survey Messenger Tool Rights article for information on available tool rights.

Survey Messenger field descriptions

Field	Description
User/Group	This dropdown list allows you to save message templates to your user account or a user group to which you belong. You must have Tool Rights for User Group Formats in Survey Messenger to save templates to user groups.
Template	This dropdown displays available templates. To create a new template, select **<new>** from this list.
Filter Criteria	
Message Type	This field determines the type of message that is sent. The following options are available: • **General Notification** (Default) • **Priority Notification** • **Attendance** • **Behavior**
Survey	A comprehensive list of surveys created in Survey Designer.
Deliver To:	The intended recipients of the message: • **All respondents -** Indicates the message is sent to all recipients of the survey. • **Only not completed respondents** - Indicates the message is only sent to recipients who have not completed the survey by the Messenger Start Delivery date and time. • **Only completed respondents** - Indicates the message is only sent to recipients who have completed the survey by the Messenger Start Delivery date and time.
Delivery Devices	
Inbox	The Inbox option is automatically selected. This option places a note in the inbox that a new message is available. Infinite Campus strongly recommends leaving this option marked to ensure delivery to Portal Accounts that have no other delivery device marked for messages.
Email	The Email option sends an email to the guardian's email address on record (entered in Census > People > Demographics).
Voice	The Voice option calls the guardian's phone number on record (entered in Census > People > Demographics). This feature applies only to schools/districts that use Campus Messenger with the Voice add-on.
Text	The Text option sends a text message to the guardian's mobile device. Recipients who have indicated a desire to receive text messages must have the Text (SMS) checkbox marked in the Personal Contact Information editor of the Demographics tab to receive text messages. This feature applies only to schools/districts that use Campus Messenger with the Voice add-on.
Message Details	

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Sender's Email</td><td>This field displays the email address that is automatically included in the message body for message recipients to reference.

<table><tr><th>If the "Use Sender's Email from Census as Sender's Email Address" checkbox is...</th><th>Then this field displays the email address entered in....</th></tr><tr><td>selected on the Email Settings tab</td><td>Census > People > Demographics > Email</td></tr><tr><td>NOT selected on the Email Settings tab</td><td>System Administration > Messenger > Messenger Preferences > Email Settings > Default Sender Email Address</td></tr></table>
This field can be changed if the Allow Custom Sender's Email Address checkbox is marked on the Email Settings tab.

Existing templates may display a different address if the Allow Custom Sender's Email Address checkbox is marked and a user modified the Sender’s Email field.</td></tr>
<tr><td>Caller ID</td><td>This field displays the phone number that is automatically included in the message body for message recipients to reference.

<table><tr><th>If the "Use Sender's Work Phone from Census as Caller ID" checkbox is...</th><th>Then this field displays the phone number entered in....</th></tr><tr><td>selected on the Voice Settings tab</td><td>Census > People > Demographics > Work Phone</td></tr><tr><td>NOT selected on the Voice Settings tab</td><td>System Administration > Messenger > Messenger Preferences > CallerID Preferences</td></tr></table>
This field can only be changed if the Allow Custom Caller ID checkbox is marked on the Voice Settings tab.

Existing templates may display a different Caller ID if the Allow Custom Caller ID checkbox is marked and a user modified the Caller ID field.</td></tr>
<tr><td>Message Subject</td><td>This field determines the text that displays in the Subject field of the email message.</td></tr>
</table>

Field	Description
Message Body	You can enter comments in the Message Body using the WYSIWYG editor. The following fields may be inserted into the body of the message by clicking on the insert Campus Field icon. • *Messenger Recipient* ◦ firstName ◦ lastName • *Survey* ◦ name ◦ startTimestamp ◦ endTimestamp ◦ startDate ◦ endDate ◦ portalURL Do NOT copy attribute fields from another Messenger tool in Campus. The attribute fields are not the same. *Message Body supports the use of Chinese characters for email messages only.*
Browse and upload a recorded message	This option allows you to send a voice message. See the article Messenger with Voice - Setup and Details for more information about this feature. You *must* click the **Upload** button after browsing for the attachment. When an attachment is uploaded successfully, the Attach File message appears on the screen.
Browse and upload an email attachment	This option allows you to attach a file to the email. See the Digital Repository Preferences article for information about supported file types and sizes. You *must* click the **Upload** button after browsing for the attachment. When an attachment is uploaded successfully, the Attach File message appears on the screen. This option is controlled by an email preference set by the District Administrator and may not display in all districts.

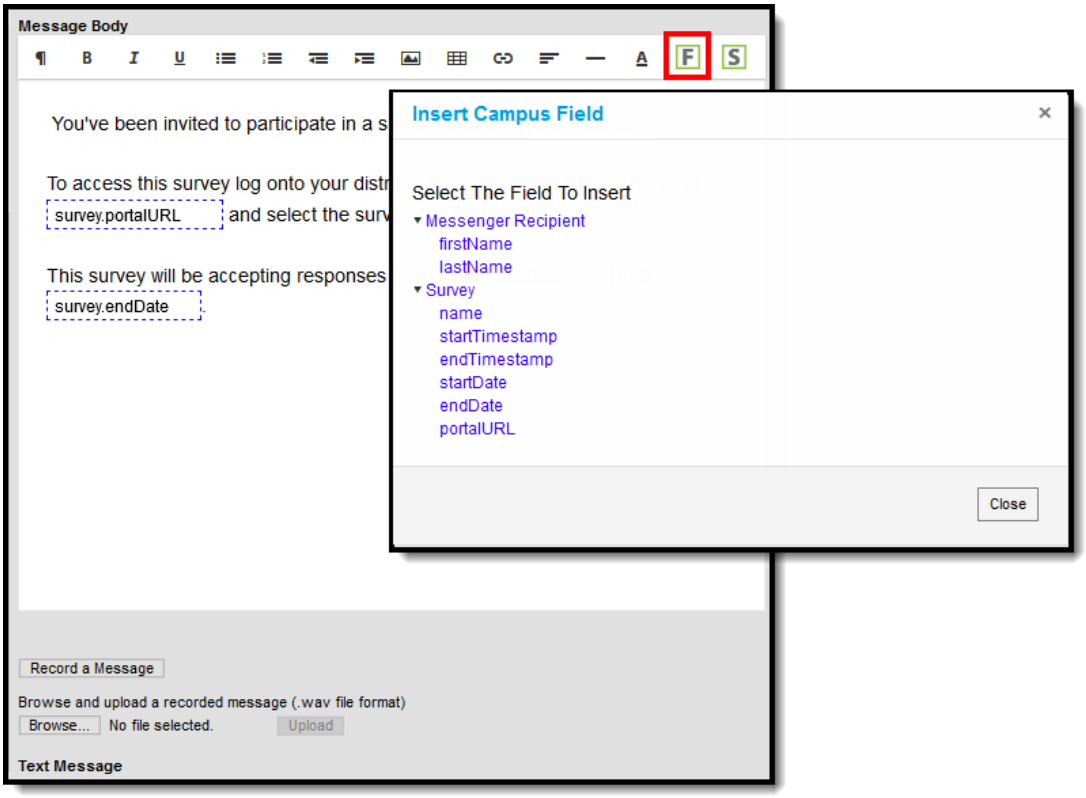
Field	Description
Text Message	The text message to be sent to the guardian's mobile device. Infinite Campus recommends not exceeding 140 characters, as this may result in multiple messages being sent to recipients in random order. The character limit for text messages is 400 characters. Infinite Campus recommends not exceeding 140 characters, as this may result in multiple messages being sent to recipients in random order. The maximum length of a text message is set to 400 characters. When a text message reaches this length, a warning message displays indicating this. The message cannot be saved until the character limit is met. Existing text message templates still display in full, but need to be modified to fit within this limit before sending. If users wish to stop receiving text messages, they can text STOP to the short code. This results in the user receiving no further text messages from Campus, even if the user has the Text option marked on their Contact Preferences. Users need to go through the opt-in process again to start receiving texts at a later date.
Delivery Date:	The day on which the message should be sent.
Send Inbox/Emails at:	The time inbox and/or emails are delivered. The time is saved with the templates. If messages should always go out immediately after Send is selected, this field should be left blank.
Dial Window	These fields create a dialing window during which a general voice message may be sent. The default values for these fields are set up on the Voice Settings tab System Administration > Messenger > Messenger Preferences > Voice Settings). Dial Window times must be entered and saved with templates. If the start time entered on the message is earlier than the start time on the template (and the start time on the template is after the start time entered on the Voice Settings tab), Messenger uses the start time on the template and does not send the message until that time is reached. If the end time on the Dial Window is earlier than the end time entered on the Voice Settings tab, calls do not stop. Instead, they continue until the end time on the Voice Settings tab is reached. In addition, if a voice message is still delivering when the District end time is reached, message delivery is stopped and is not completed.

Campus fields and sub-reports for Survey Messenger

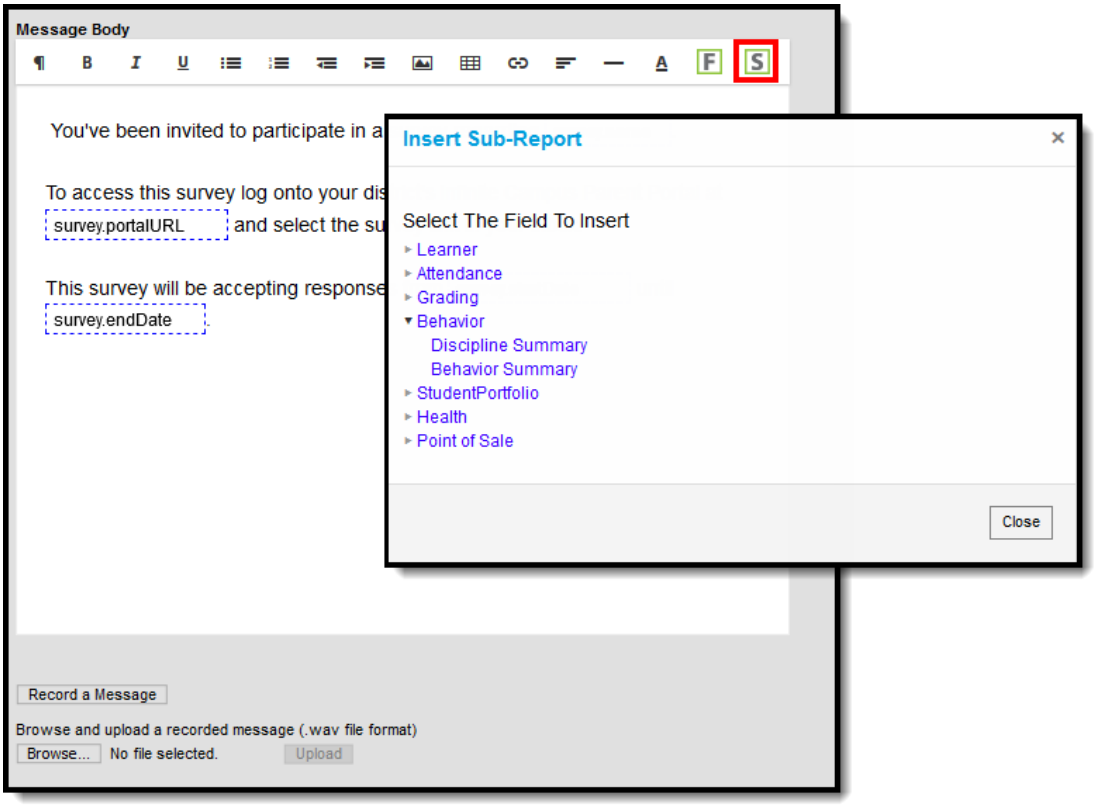
Campus Fields and Sub-Reports include specific fields for use in the Message Body WYSIWYG. These fields are designed to pull the latest qualifying event, based on filter criteria. Other fields are available, but they use ad hoc logic and may not return the most recent event data when multiple events occur in a year.

Any ad hoc fields that have been deactivated display in red. Use the Element Replacement tool to locate deactivated elements and replace them with the new field.

> Campus Fields can also be added to Text Messages. Sub-Reports cannot be added to Text Messages.



Survey Messenger Campus Fields



Survey Messenger Sub-Reports Selections

Sub-report options

The following table lists the sub-report options for each area.

Area	Sub-Reports
Learner	Student Schedule Active and Dropped Student Sch
Learner Planning	Course Requests Course Plan
Attendance	Period Mark Summary Course Mark Summary Whole/Half Day Summary Exact Day Summary Single Day Count Summary
Grading	Grade Detail Term GPA Summary
Behavior	Discipline Summary Behavior Summary
Student Portfolio	Cumulative GPA and Class Rank

Area	Sub-Reports
Health	Immunization Health Screening Concussion Health Screening Dental Health Screening Hearing Health Screening Scoliosis Health Screening Vision
Point of Sale	POS Account Balance

When using sub-reports in letters, please note the following:

- All behavior data is included when adding either sub-report.
- A field is displayed only if there is data for that field. If a field is selected from the sub-report, but there is no saved data for that student, the information for that field does not display.
- A sub-report option only displays if the district/school records that data.

Create a new Survey Message template

Templates allow you to create reusable messages that save time and standardize content.

1. Select the **<New>** option from the Template dropdown list.
2. Use the Field Descriptions to complete the Survey Messenger editor.

   The Message Body uses a WYSIWYG editor.

   Do NOT copy attribute fields from another Messenger tool in Campus. The attribute fields are not the same.

3. Click the **Save** button at the top of the message editor.
4. Enter a name for the template in the pop-up box. The template appears in the **Template** dropdown list.

Delete a Survey Message template

1. Select the template you want to delete from the Template dropdown list.
2. Click the **Delete** button. A confirmation message displays.
3. Click the **OK** button. The template has been removed and no longer appears in the Template dropdown list.

Create and send a Survey Message

1. Select an existing Template from the **Template** dropdown list.
2. Use the Field Descriptions to complete the Survey Messenger editor.

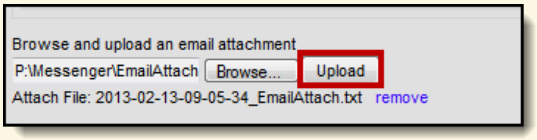
The Message Body uses a WYSIWYG editor.

Do NOT copy attribute fields from another Messenger tool in Campus. The attribute fields are not the same.

For more information about using the options available with the editor, see the WYSIWYG Editors article.

3. Browse and upload an email/voice attachment. (**optional**)

You *must* click the **Upload** button after browsing for the attachment. When an attachment is properly uploaded, the Attach File message displays on the screen.



4. Click the **Test** button to review the message and its recipients.

Infinite Campus strongly recommends testing messages before delivering them. A message is sent exactly as it is delivered to recipients. The Test Message screen confirms that the test message was sent.

5. Click the **Preview/Send Message** button. The **Preview Message** screen displays.

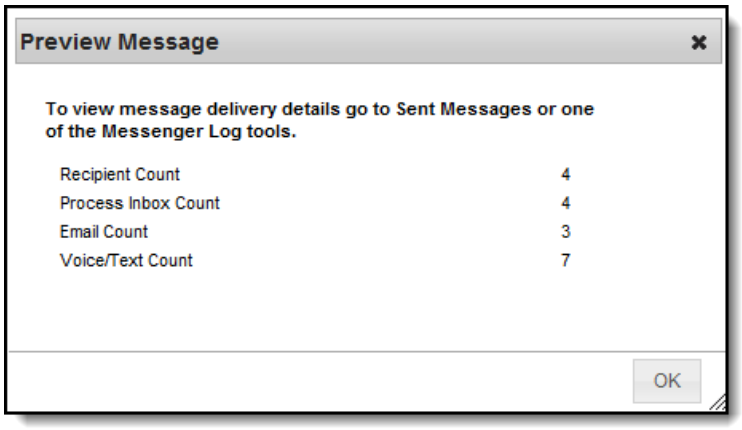


6. Click the **Review Recipients** button. The Review Recipients screen displays.

7. Complete the following tasks on the Review Recipients screen. (Optional)

Task	Description
To exclude recipients/phone numbers	Clear the checkbox next to a name or phone number.
Preview the message	Click the page icon in the **Preview** column.
To exit and return to the Message Preview screen	Click the **Save & Return** button if you have made changes to the recipient list. Otherwise, if no changes have been made, click the **Cancel** button.

8. Click the **Send Message** button on the **PreviewMessage** screen. The Preview Message screen displays. This screen confirms that the message tasks have been completely set up for delivery at the times entered in the **Send Emails At** and/or **Dial Window** fields of the main Message Builder screen. **This screen does not indicate that the message is currently being sent.**



9. Click **OK**.