Two-Way SMS Administrator Guide

Detailed instructional guide for admins setting up and using the Connect Learn Two-Way SMS application

Administrator Guide

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Introduction

Connect for Learn Two-way SMS is an application that offers faculty and staff a conscience, seamless platform for sending and receiving SMS messaging. The Admin role is extremely important in not only installing the application but in setting up Gatekeeper and Instructor accounts, handling filters, and creating keywords and opt-out procedures. The Admin is required to authorize courses and users accounts. The following is information that is vital to the Admin as a guide to understanding Connect for Learn Two-way SMS and its features. This guide will explain in detail how an Admin functions.

Prerequisites

Connect for Learn Two-way SMS application must first be installed by the Admin from the Learn Building Block. Once this is completed, the Admin must then enable selected courses from their course list. The ability to purchase message credits will be obtainable after install. Software updates will be offered to the Institution when available. Additional set-up procedures will not be required once the initial installation of the Two-Way SMS has been implemented.

Terminology/Roles

- <u>Admin</u>: Highest level of User for the institution (super user). This User can install the building block, set up other User accounts, and allocate message credits to Gatekeepers within the application. The Admin is also responsible for enabling preferred courses to use the Two-way SMS application and setting up filters for use by the other roles.

- <u>Gatekeeper</u>: Typically department heads, this is a manager role that controls the flow of message credits (the 'parent' to the 'subsidiary') to subsequent Instructor User accounts, thus allowing the Instructor the ability to send messages to students enrolled within courses associated with that Instructor.

- <u>Instructors</u>: This is a role for teachers who use the Two-way SMS application for communication with students (students are grouped per course). The Instructor role is always tied to a specific course and the Instructor can only send messages to students registered within that course.

Set-up

The Two-way SMS application must be installed by the Admin. The Installation Guide will be provided to ensure all the specific details of the installation are completed so the Institution will be able to utilize this application. The basic steps to set-up are as follows:

- The Administrator logs into the Connect for Learn Dashboard
- The Admin navigates to the System Admin page from the top navigation
- From this page, the Admin will traverse to the section marked Building Block and chose the hyperlink of the same name
- The Admin must click the Install Tools section
- Once on the Install Tools page, the Admin must scroll to find Send Two-way SMS in the list
- The Admin will then activate Send Two-way SMS
- At this point the Admin is then taken through the sets to set up the DB schema and make the application available

For additional details of the Installation process, please consult the Installation Guide.

Enable Courses

Once the set-up of the Two-way SMS has been completed, the Admin will be in the tab marked Management. The Admin will need to go into Course Management in order to enable a course to use this application.

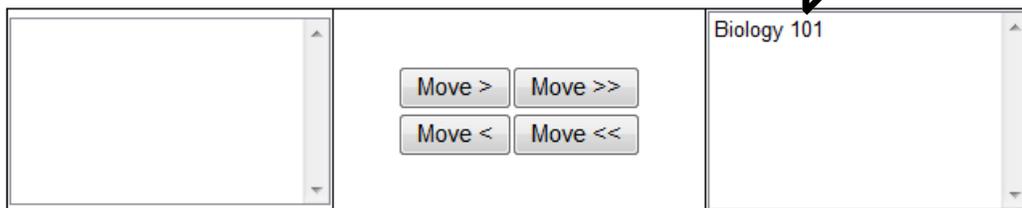A course can be chosen by searching either for the Course ID or the Course Name.

Once a course or courses have been selected, the UI will auto-populate the item or items in Step 2 of the processes. The Admin will be able to enable (and later to disable) any and all courses chosen though the UI.

- ✓ Admin clicks on a course selection, highlighting it
- ✓ Admin then can move the course or courses to the right in order to enable that course for Two-way SMS

2 Select course

Enable Course - Move course from left to right
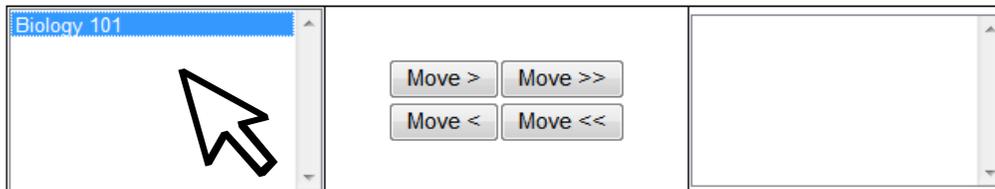
Disable Course - Move course from right to left

- ✓ Admin moves course or courses over to the right to enable them to use the application
- ✓ Admin can also disable any course or courses by clicking on the course(s) and moving from right to left

From this page (Course Management) the Admin also has the ability to enable all Instructors associated with this course to have access to the Two-Way SMS application by selecting the bulk enable checkbox.

3 Bulk enable all instructors

☑ Enable all instructors on this course
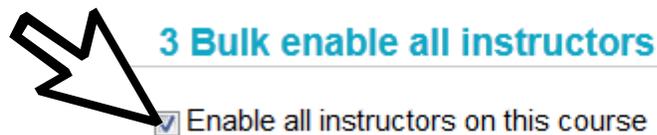
Clicking on this feature will then bring up a list of Instructors that the Admin can then select as an available Gatekeeper for this course.

4 Select an available gatekeeper

- ○ mmintz
- ○ ccustard
- ○ jennietheacademic
- ○ ianhudson
- ○ ccharroux
- ○ davetheacademic

The last section of the Course Management page allows the Admin to choose some SMS options for the course. The Admin can choose one or more or none.

Create Gatekeeper Account

An Admin can create Gatekeeper accounts in several ways. The first way is explained above: the Admin will go into Course Management, enable a course for Two-way SMS and select a Gatekeeper from that page. Gatekeeper accounts can also be created through the User Management page.
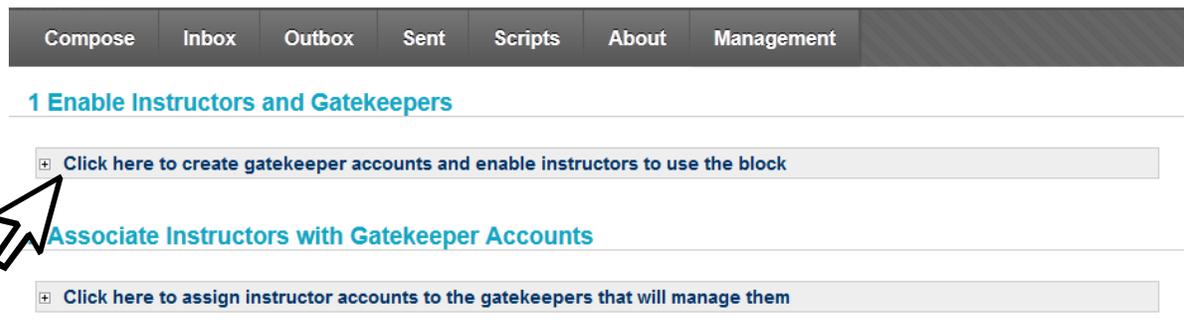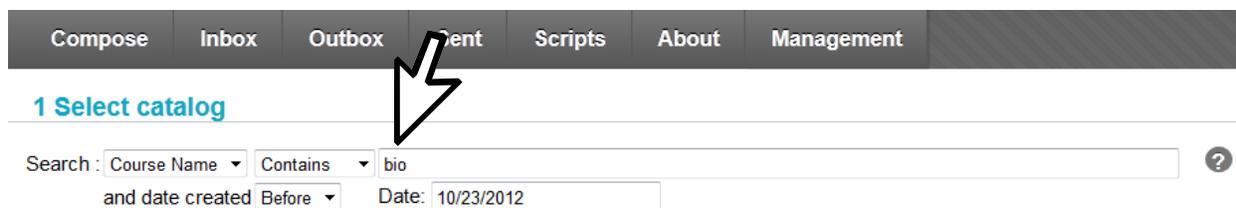

In order to create a Gatekeeper account the Admin must choose a course to which the Gatekeeper will be associated with. As with the Course Management page, the Admin must search from the Course Catalog and pick a course that the Gatekeeper will be assigned to.

Then the Admin must click on the course that they wish to link a Gatekeeper account with.

2 Select course

Biology 101

Once the course has been highlighted, the Admin will then see a list of all Instructors connected with this course. In order to assign a Gatekeeper to the account, the Admin must click on the chosen Instructor and move them from the left to the right using the Move option. By click on and highlighting one of the Instructors, the Admin will then have the option of making the selected Instructor into a Gatekeeper account.

3 Enable instructors

Associate Users - Move from left to right.

Select User On Right To Toggle Gatekeeper Status & ConnectTxt Account.

mmintz
ccustard
mryan
beth
jennietheacademic
ianhudson

Move >   Move All >>
Move <   Move All <<

The User is enabled upon being moved from left to right. More than one Instructor can be selected and moved to the right, but only one will be allocated as Gatekeeper for this specific course.

Associate Users - Move from left to right.

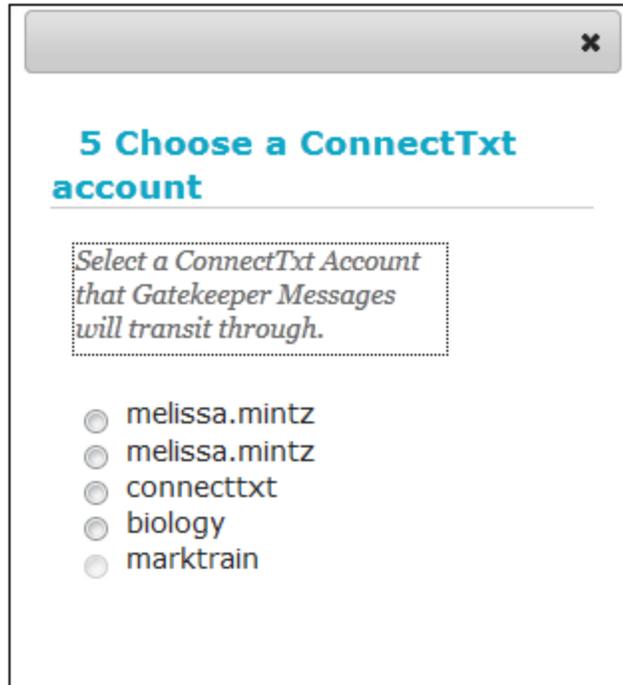*Select User On Right To Toggle Gatekeeper Status & ConnectTxt Account.*

Users Enabled.

Clicking on the Instructor name once will display the checkbox asking the Admin if they wish to have the chosen Instructor act as a Gatekeeper.

Toggle Gatekeeper status: ☐

The Admin can either double-click the selected Instructor or simply check the checkbox to enable the given Instructor as the Gatekeeper of the chosen course.

Toggle Gatekeeper status: ☑

If the Admin double clicks the Instructor name as establishing that account as a Gatekeeper, the system will automatically use this account to transmit Gatekeeper messages, instead of asking for another account for that purpose. Essentially the Gatekeeper account, in this manner, will function dually as an Instructor. But if the Admin manually checks the checkbox, the Admin will see a pop-up window that asks the Admin to select an account that will route messages by the Gatekeeper. This is not a mandatory step and will not display as an option unless the Admin decides the Gatekeeper account will direct messages though another account.

5 Choose a ConnectTxt account

Select a ConnectTxt Account that Gatekeeper Messages will transit through.

○ melissa.mintz
○ melissa.mintz
○ connecttxt
○ biology
○ marktrain

From Course Management

- Admin selects a course that will utilize Two-way SMS
- After choosing the course, the Admin will then bulk enable all Instructors associated with that course
- Admin will then be able to select a Gatekeeper from the available Instructors

From User Management

- Admin selects a course that will utilize Two-way SMS
- After course selection, the Admin highlights Instructor chosen to act in the Gatekeeper role
- User name is moved from left to right as part of the selection process
- Double-clicking user will create Gatekeeper account that allows messages to go directly though that account
- One click on user name and checkbox will appear
- Admin must check checkbox
- Once checkbox is marked, Admin will see pop-up window asking for an account to which Gatekeeper messages will be routed though

Associating Accounts

Also within the User Management page is the ability for the Admin to associate Instructors with Gatekeeper account. To do this, the Admin must expand the Assign Instructor Accounts to Gatekeepers section. Once this is done, the Admin will see a list of Gatekeepers. They will be tasked to choose one.
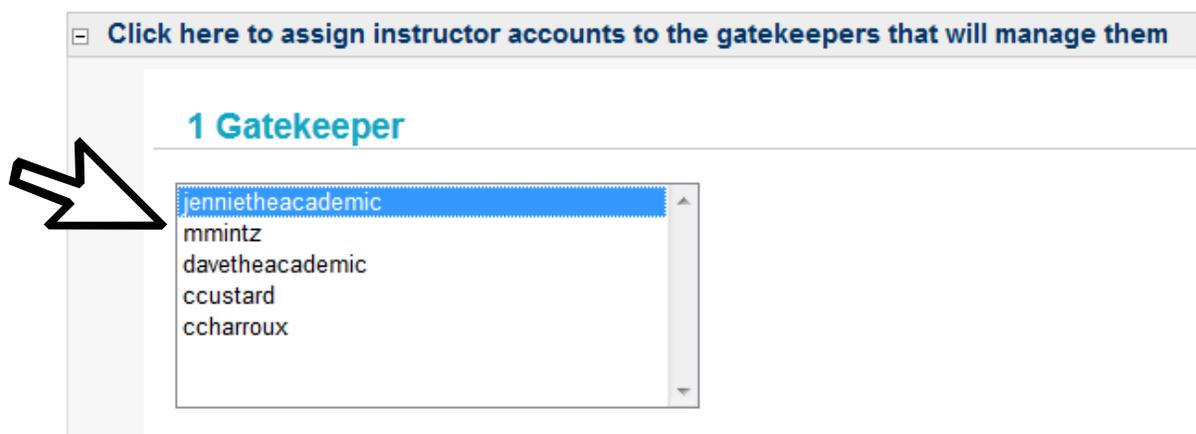

From here, the Admin must choose the course, then the Instructors within that course, who will be associated with that selected Gatekeeper.
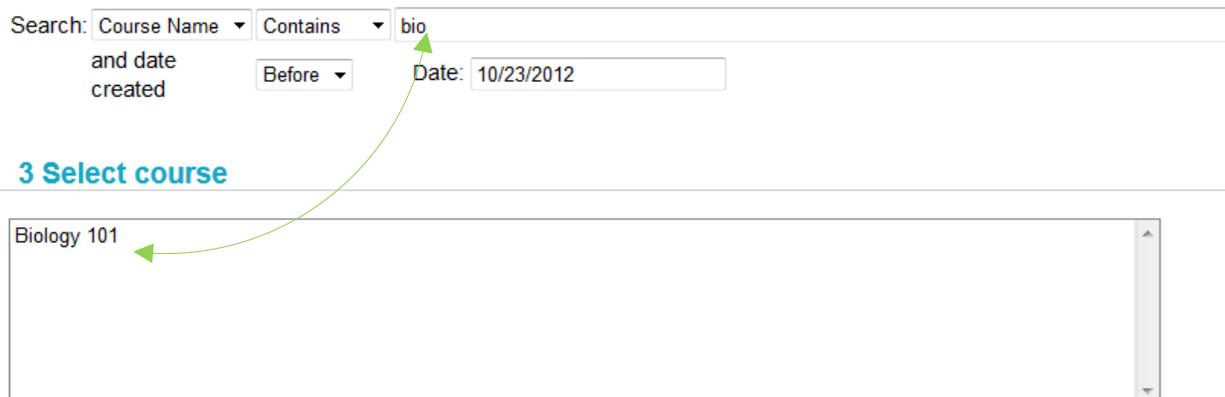
Upon highlighting the specific course, the Admin will get a list of Instructors. To associate one or more Instructors with the Gatekeeper, the Admin will use the Move functionality to shift an Instructor from left to right. Subsequently, if the Admin decides to disassociate an Instructor, they can shift the Instructor in the other direction.

3 Select course

Biology 101
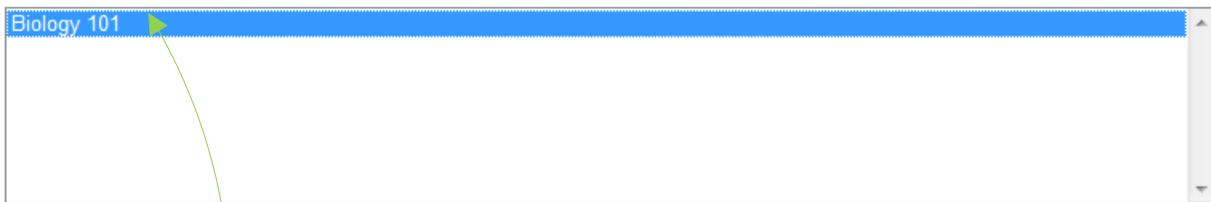
4 Select Blackboard users

Associate Users - Move from left to right. Disassociate User - Move from right to left.

Disassociating users will delete their unused credit balance. Scheduled messages will fail until the user is reassociated with a gatekeeper and assigned message credits.

mryan
beth
ianhudson

Move >   Move All >>
Move <   Move All <<

In both sections of the User Management page (Create Gatekeeper Accounts and Assign Instructor Accounts) the Admin has the ability to disable the Gatekeeper message credit functionality, which would prevent the Gatekeeper from being able to allocate message credits to individual Instructors. The Instructors would no longer have any individual credit balance but be able to take from the total balance of message credits dedicated to their specific course. This feature, if selected by the Admin, will only affect the Gatekeeper in reference to message credit allocation, nothing else. The Admin can reinstate the message credit allocation ability at any time.

3 Disable gatekeeper credit allocation globally

Check to disable gatekeeper message credit allocation function for all gatekeepers.

☐ Gatekeeper message credit management

Message Allocation

The Institution can buy packages of message credits for the Two-way SMS application. It is the Admin's job to distribute those credits to the Gatekeeper accounts, thus allowing the Gatekeeper to allot the credits given to the Instructors that are associated with that Gatekeeper.

The Admin will use their corresponding ConnectTxt account to divide the message credits to each Gatekeeper. The first step is for the Admin to log into their ConnectTxt account, enter into the Accounts tab and select the Messages option from the left-side navigation.
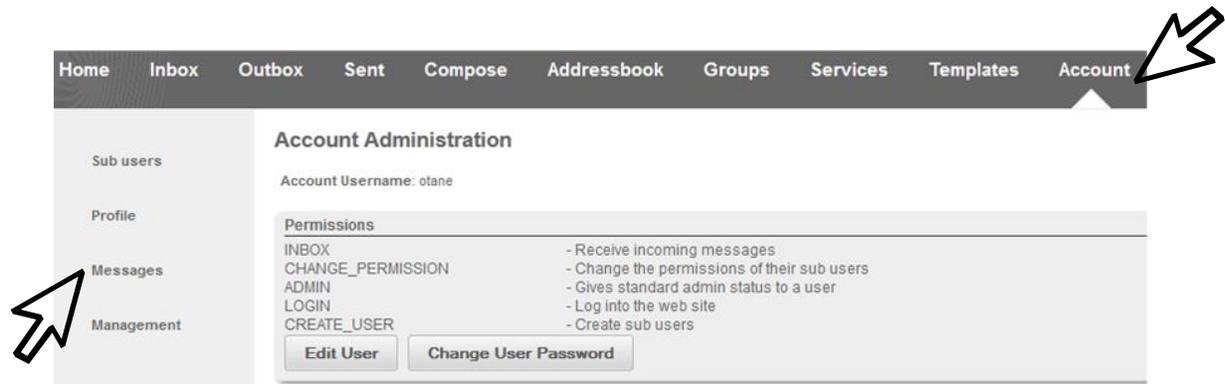
Once in Messages, the Admin will go to the bottom of that page, where they will find the Credit Allocation section.

The Admin can choose to allocate credits or to revoke them via the dropdown list.

The Admin will then manually enter in how many credits will be allocated (or revoked).

After the number of message credits has been entered, the Admin will then choose which sub user they will allot the credits too.

Once this is complete, the Admin will hit Submit and the Gatekeeper will then have the message credits available to them for further distribution.

A balance of message credits can be seen, broken down by Gatekeeper, when in a selected course.

To view the message credit detail for each Gatekeeper, the Admin must highlight a user. The UI will display the name of the Gatekeeper, the amount of credits that have been used and the amount of credits still available to that Gatekeeper.
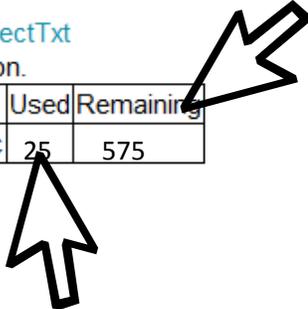
It is up to the individual Gatekeeper to distribute the message credits assigned to them.
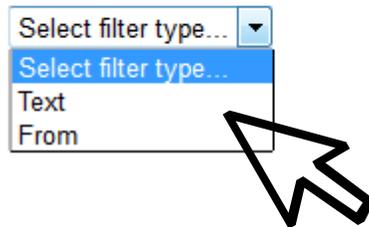
Filter Management

The Filter Management section allows for the categorization of inbound messages into the selected course. Filters can direct messages into an Instructor's email, Two-way SMS inbox, or directly to the Instructor's phone.

Creating Keyword Filters

The Admin starts the creation of filters by selection what type of filter they wish to use by selecting a keyword used to associate with a specific Instructor or Instructors. Filters can be either a 'Text' filter (keyword) or a 'From' filter (selected recipients).

If the Admin selects 'Text', the Condition field will auto-populate to Begins.

If the Admin selects 'From', the Condition fields will auto-populate to Equals.

1 Select message component

From ▼

2 Select condition

Equals ▼

The Condition will set according to the Component picked for the Filter. This will be automatically set once the Component field has been selected.

The next field required for setting up the filter is the Condition Value field. The value (a keyword of recipient name) must be entered manual in order to set the filter. The Condition Value can be any word/keyword or recipient name available.

3 Condition value

CALIFORNIA

The Condition Value is a keyword that is associated with a specific Instructor account. For example, to make sure that all replies to the biology Instructor's messages go to the Instructor's inbox, the admin will attach a keyword, which in turn routes all SMS messages with that keyword attached to that specific Instructor's account. The keyword identifies what long code/short code is attached and channels the messages accordingly. The Admin will set instructions for all messages with that keyword to do one of the following actions:

- Send message to the Instructor's external email
- Send message to the Instructor's phone
- Send message to the Instructor's course inbox

4 Select a forwarding action

Forward Action.

Select filter action... ▼

Select filter action...
Forward to instructor's e-mail
Forward to instructor's phone
Forward to instructor's inbox
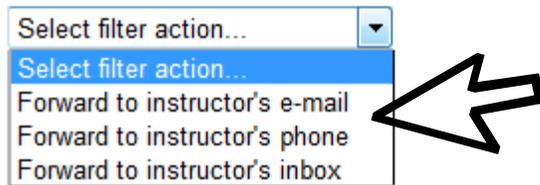
Once the initial parameters have been set, the Admin must then select which Instructor in which course will be receiving these keyword filters. The Admin must go through the same process of locating a course by either the course ID or the course name.

Compose	Inbox	Outbox	ent	Scripts	About	Management

1 Select catalog
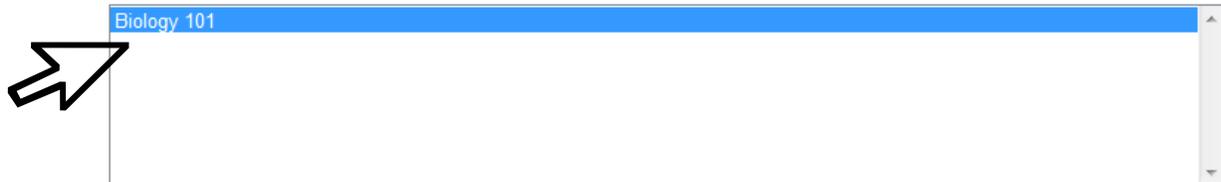
Search : Course Name ▼ Contains ▼ bio   ❓

and date created Before ▼   Date: 10/23/2012
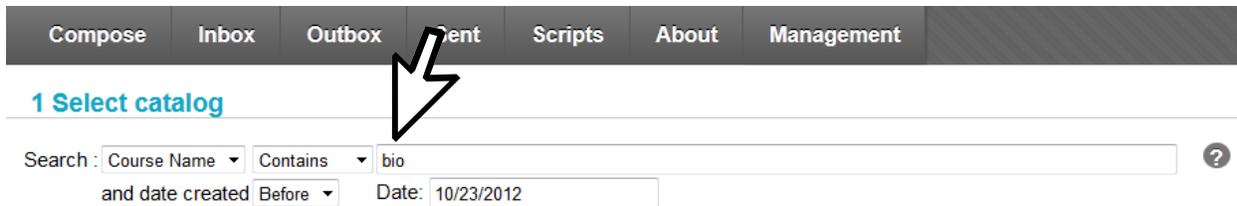
The Admin will then select from one of the available courses.

6 Find the recipient's course

Biology 101

A list of available Users will be displayed. The Admin must choose one or more Users to attach to this filter.

7 Select recipients

mryan
jennietheacademic
mmintz
ccustard
ianhudson
beth

Once the User has been selected, the Admin hits the Submit button to create the keyword filter.

The page also displays all current keyword filters in use for the selected course. The UI will present the keyword, actions, recipients, and delete functionality.

Keyword Filter	Action & Recipient	Action & Recipient	Action & Recipient	Delete Filter & Actions
PLANT	Inbox - Mintz, Melissa	Inbox - Administrator, Blackboard	Inbox - Hudson, Ian	Delete
ANIMAL	Inbox - Mintz, Melissa	Inbox - Administrator, Blackboard	Inbox - Hudson, Ian	Delete
HUMAN	Inbox - Mintz, Melissa	Inbox - Administrator, Blackboard	Inbox - Hudson, Ian	Delete

Delete Filters/Keyword Filters

From the Filter Management page, where the Admin is able to view the existing filters, there is the option to delete any filter. The Admin can simply click on the Delete button to remove any keyword filter. The keyword can be used again, if the Admin desires.

Keyword Filter	Action & Recipient	Action & Recipient	Action & Recipient	Delete Filter & Actions
PLANT	Inbox - Mintz, Melissa	Inbox - Administrator, Blackboard	Inbox - Hudson, Ian	Delete
ANIMAL	Inbox - Mintz, Melissa	Inbox - Administrator, Blackboard	Inbox - Hudson, Ian	Delete
HUMAN	Inbox - Mintz, Melissa	Inbox - Administrator, Blackboard	Inbox - Hudson, Ian	Delete

Backup Email Management

The Backup Email Management section allows the Admin to create a reserve system that fashions copy emails for all SMS being sent. The Admin must know the server IP address and username/password to begin set up of the system. This information will be obtained through the Institution only. The Admin will then be asked to make a header, subject line and 'From' field. The header and subject lines must be unique, and can be anything that the Admin desires in terms of identification. In order for authentication to occur, the Admin must add "1" to the Use Authentication field. All of the fields are required. Once completed, the Admin will hit the Submit button and the backup email will be generated.