Guide to Transitioning from Contact Manager to SchoolMessenger App

Contents

Overview: Contact Manager End-of-Life (EOL)

Intrado/SchoolMessenger solutions has begun the End-of-Life (EOL) process for Contact Manager. Contact Manager, which is being sunset, is the predecessor to InfoCenter (now the SchoolMessenger app) and is still used by a small group of our customers.

As a direct replacement, the SchoolMessenger app provides the same functionality as Contact Manager: allowing parents to set up their contact preferences and review all of their received messages. Additionally, it adds more capabilities including the potential for teacher messaging. Like Contact Manager, the SchoolMessenger App is available free of charge to districts and parents. These features are available in a web interface, or via a mobile app.

To learn more about the app and its capabilities, you can view these introductory videos:

- SchoolMessenger App (English)

- SchoolMessenger App (Spanish)

⚠️ **Important**: Contact Manager will officially be phased out by June 30, 2018, but it is recommended that you move to the SchoolMessenger app long before then for a seamless transition.

📝 **Note**: The SchoolMessenger app is not the same app as is used to send broadcasts to your contacts. That is known as the SchoolMessenger Admin Sender app, and is a completely separate app.

How to Transition?

The method by which you transition from Contact Manager to the SchoolMessenger app depends on how you would like your contacts to manage their contact information in the SchoolMessenger app. There are four main methods of configuration:

- **Full edit control: allowing** users the ability to add and edit any contact information to the SchoolMessenger app, as well as edit contact information imported by an admin.

- **Partial edit control (User-Added Contact Data only): allowing** users to add and edit any contact information to the SchoolMessenger app, but **not allowing** them to edit their contact information imported by an admin.

- **Partial edit control (Admin-Imported Contact Data only): allowing** users to edit their contact information imported by an admin, but **not allowing** them to add any contact information to the SchoolMessenger app themselves.

- **No edit control: not allowing** them to edit any of their contact information imported by an admin and **not allowing** them to add their own contact information.

Note: Even if you choose to disallow your contacts from editing their contact information, they will still be able to view or listen to their messages (your broadcasts from SchoolMessenger Communicate) from the last 30 days, as well as participate in the teacher messaging feature (if enabled), the messages of which are also viewable historically. They will be able to view their contact information, but will not be able to modify it if you have disallowed the ability to change it.

No User Edit Control

The primary reason that one would choose this method is if the contacts are **already editing their contact information in a parent portal** that connects to the Student Information System (SIS) directly, or if **your administration is totally managing the contact information** that syncs over to Communicate, and there is no involvement from the parents except to provide you with updates directly.

Changes to contact information in the SchoolMessenger App sync back to Communicate in the form of overrides on your system contacts, but this is not necessary if they are already making changes to their contact information in a SIS parent portal or if your administration is managing the contact information updates with information provided by parents directly. If you chose not to allow your contacts to edit their own information in Contact Manager, then you should, in most cases, choose to do the same in the SchoolMessenger App.

Steps to Transition:

1. As an Administrator-level user, log in to Communicate.

2. Go to the **Admin** tab, then to the **Settings** sub-tab, and click on **SchoolMessenger Settings.**

3. Make sure that both of the following options are **not checked** and click **Save**:

- "Allow recipients to remove their contact info imported by an admin"

- "Allow recipients to add and remove their contact info not imported by admin"

4. Inform the parents/contacts of your implementation of the SchoolMessenger app as a replacement for Contact Manager, and ask them to start using it instead of Contact Manager immediately. Giving them a deadline, though not necessary with this method, may provide incentive for participation. We also have resources available to help you inform your parents.

5. The SchoolMessenger app is free and, in most cases, is already enabled for your account without you having to do anything. You can have your parents visit https://go.schoolmessenger.com/ and click **Sign Up** to create an account. On first login, they will need to log out, and then log back in to see their preferences.

6. Once the user's email address has been verified, contact preferences made in Contact Manager will automatically carry over into the SchoolMessenger app.

- If parents receive a message that the email address is already being used, they will need to click **Log In** instead of **Sign Up**, and follow the "**Forgot your password?**" link to complete those steps. (This just means that the email address they attempted to sign up with was previously being used for their Contact Manager account, and by doing this, they will move the association from Contact Manager to SchoolMessenger app.)
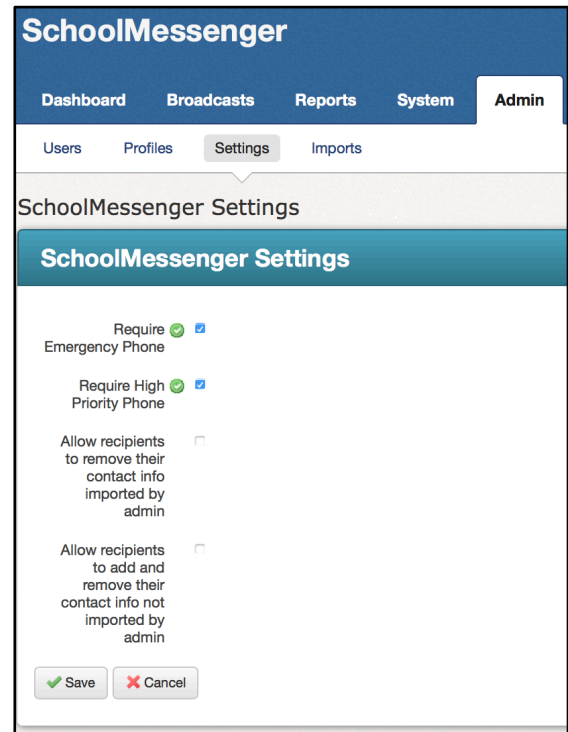
⚠️ **Important**: Contacts must use an email address that is already on file in your Communicate account. If they use an email address that is not on file in Communicate, then they will be able to create an account and even use TIM (if enabled), but they will not see any message history, be able to view their contact information, or receive broadcasts sent via Communicate.

7. After any deadlines that you have set for your parents to participate are over, call SchoolMessenger solutions support and have us de-activate Contact Manager from your account. This will remove all associations previously established by Contact Manager, and the associations from SchoolMessenger app will prevail.
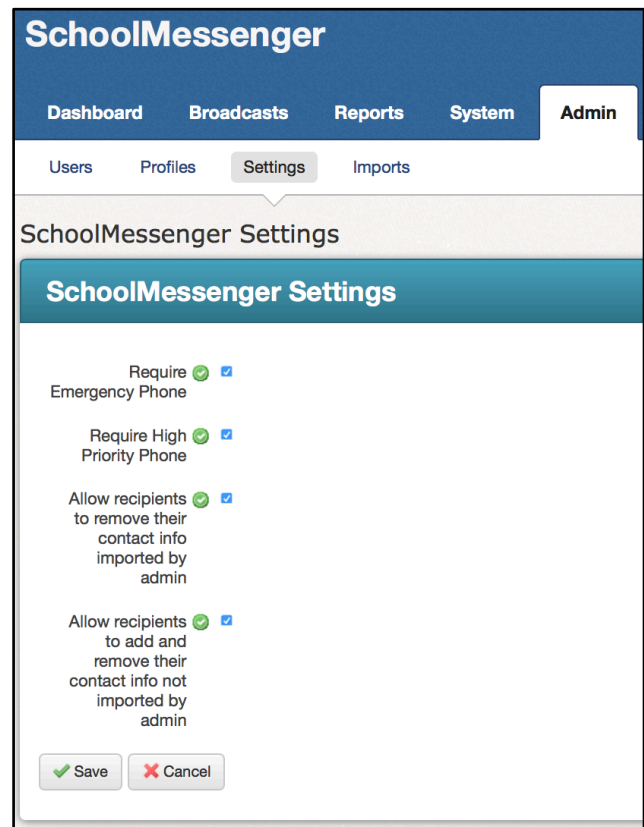
Full User Edit Control

The reasons that one would choose this method are as follows:

- The contacts are *not* already editing their contact information in a parent portal that connects to the Student Information System (SIS) directly, and/or this is not planned to be in place at any point.

- Your administration does *not* intend to manage the contact information updates that sync over to Communicate, in favor of parents updating this directly using SchoolMessenger app (where they had probably used Contact Manager for this before).

Changes to contact information in the SchoolMessenger app sync back to Communicate in the form of overrides on your system contacts. If you chose to allow your contacts to edit their own information in Contact Manager, then you should, in most cases, choose to do the same in the SchoolMessenger app.

Steps to Transition:

1. As an Administrator-level user, log in to Communicate.

2. Go to the **Admin tab**, then to the **Settings sub-tab**, and click on **SchoolMessenger Settings**.

3. Make sure that both of the following options **are checked** and click **Save**:

   - "Allow recipients to remove their contact info imported by an admin"

   - "Allow recipients to add and remove their contact info not imported by admin"

4. Choose a date that you want to start having the contacts use SchoolMessenger app instead of Contact Manager.

5. Inform the parents/contacts of your implementation of the SchoolMessenger app as a replacement for Contact Manager, and ask them to start using it instead of Contact Manager as of that date.

6. Call SchoolMessenger solutions support before your chosen date to have us de-activate Contact Manager from your account on the date that you chose (if applicable).

7. Once the date comes around (if applicable), you can have your parents visit https://go.schoolmessenger.com/ and click **Sign Up** to create an account. The SchoolMessenger app is free and, in most cases, is already enabled for your account without you having to do anything.

    Once the user's email address has been verified, contact preferences made in Contact Manager will automatically carry over into the SchoolMessenger app.

    • When they first successfully log in, they will need to log out, and then log back in to see their preferences. Once they are logged in, the user's contact preferences should appear as they were in Contact Manager. There is no need for them to update anything.

    Important: Contacts must use an email address that is already on file in your Communicate account. If they use an email address that is not on file in Communicate, then they will be able to create an account and even use teacher messaging (if enabled), but they will not see any message history, be able to view their contact information, or receive broadcasts sent via Communicate.

Partial User Edit Control

Depending on the preferences of your district, you may need to customize the level of control users have for editing contact info they've added themselves and/or contact info that has been imported into their account by an admin. Below is a breakdown of what each configuration will allow (or not allow) a user to do.

User-Added Contact Data only

User-Added Contact Data √ | Admin-Imported Contact Data **X**

The user can add and edit contact information they've added themselves, but cannot edit any of the contact info the admin has imported.

Allow recipients to remove their contact info imported by admin ☐

Allow recipients to add and remove their contact info not imported by admin ✓ ☑

Admin-Imported Contact Data only

User-Added Contact Data **X** | Admin-Imported Contact Data √

The user can edit any contact info imported by the admin, but can't add any of their own contact info.

Allow recipients to remove their contact info imported by admin ✓ ☑

Allow recipients to add and remove their contact info not imported by admin ☐

Questions?

If you have any questions, please contact SchoolMessenger Solutions Support.

SchoolMessenger Solutions Support

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