

General

SmartMsg allows broadcasting urgent and time-critical messages to users or groups. This is a quick reference guide for creating and sending SmartMsg Messages. **NOTE: SmartMsg Messages are sometimes referred to as “alerts” or “smart messages”.**

The *Send Message form* is used to create and send a message.

To Access the Send Message Form:

From most SmartMsg Applications:

- Select Send Message from the main menu.

From the SmartMsg Client:

- Right click the Connected SmartMsg icon
- Select Send Message from the menu that appears.



To.. Button

Use to access the object selection form where message recipients can be chosen.

Message Subject

Provide a brief summary for the message (required).

Message Priority

Can be set to High, Medium, or Low.

Snooze Option

Check this box if users should not be allowed to delay responding to this message.

Message Body

This is the main part of the message. It can hold text, links and embedded images.

Custom Responses Tab

Choose an existing custom response from the dropdown list or click New to create a new configuration. If “none” selected, message will require simple, standard response from recipients

Audio Tab

Record an audio file or select an existing audio file for the message.

Recipient List

Displays all users, devices, groups, and servers currently selected to receive the message. *Nothing can be directly typed into the recipient list, the To.. button must be used to add recipients.*

Schedule Message

Check this box and select a date/time for message delivery. By default, this option is not selected and the message is sent immediately after the Send button is clicked.

Expiration

Determines the length of time that a message will remain active after it is sent. When a message is expired it is no longer distributed to recipients.

Links Button

Use to insert a web, chat, or network link into the message body. Links allow the recipient to click text in the message and automatically be directed to web pages, chat sessions or network file shares.

Spell Check

Standard Spell Check functionality for the message body.

Embed Image Button

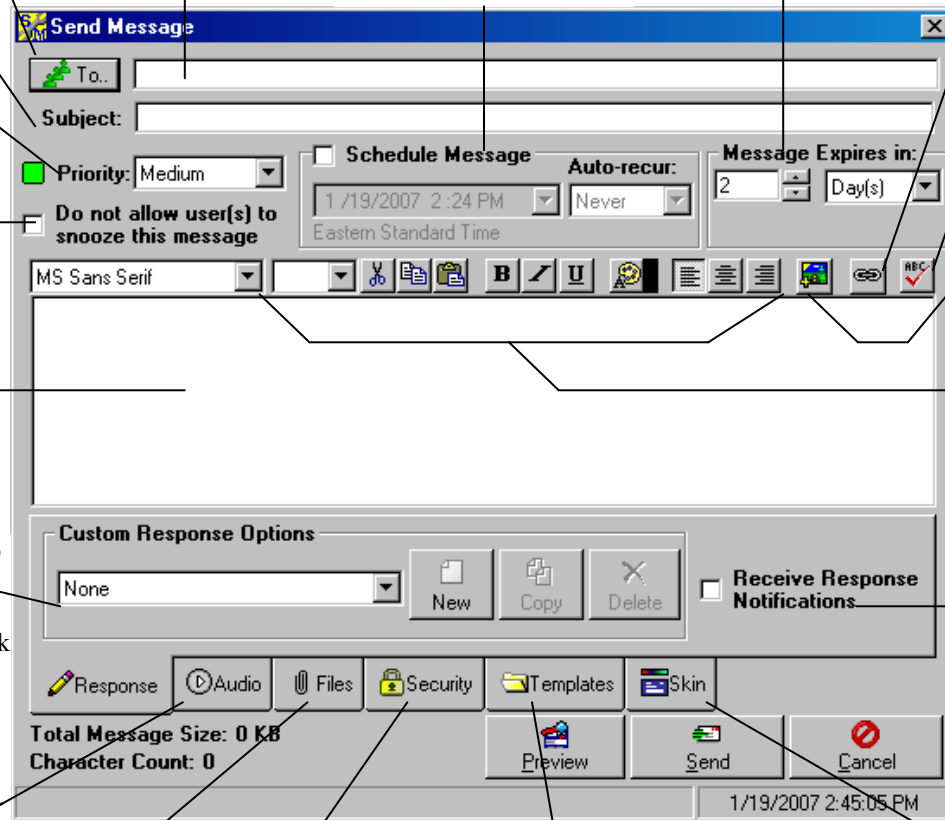
Use to select an image file to directly insert into the message body.

Formatting Options

Standard formatting options for message body text (bold, italic, underline, justify, etc.)

Receive Response Notifications

Check this box to have the message response window appear on your screen immediately after the message is sent.



Files Tab

Attach files to a message. Recipients can view or save attached files.

Security Tab

Configure special security options for the message, such as requiring reauthentication.

Templates Tab

Templates allow saving a message configuration for reuse and can contain recipient list, subject, body, attachments, security settings etc.

Skin Tab

Custom Skins allow creating messages with different colors, fonts and graphics.

Audio (Sounds)

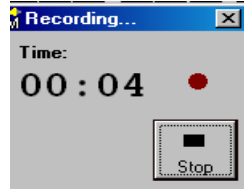
A *.wav file can be specified to provide audio for a SmartMsg message.

To Use a Pre-Recorded Audio File:

- Click the Audio tab if it is not the tab on top.
- Click Select and browse to the folder containing the audio file.
- Double click the file. The name of audio file you selected is displayed under Audio File –File Path.
- Click Play button to preview the audio file.

To use Custom (ad-hoc) Audio:

- Use the Record button to create a *.wav file for the message (microphone required).
- Click Stop to end recording.
- Click Play button to preview the audio file.



To Remove Custom Audio from a Message:

- Click the Clear button. (Audio file is removed from the message and the name of the file is no longer displayed under the Audio File Path.)

To Loop Audio:

- Select the checkbox “Loop Until Acknowledged” to play the message audio continuously on a recipient device until the user responds.

Scheduling a Message

By default a submitted message is delivered immediately. However, a message can be configured to be sent at a later time.

To Schedule a Message for a Later Time:

- Select the checkbox labeled “Schedule Message.”
- Select date and time for the message to be delivered. Enter the date by hand, or click arrow ▼ to select a date from calendar.

The message will be sent to all recipients based on the time zone specified on this form under scheduled date and time. (It is not based on the recipients' time zones.)

File attachments

To Attach a File to a Message:

- Click the Files tab if it is not the tab on top.
- Click the Add button, browse to and double click the file. (File name now appears to the left of the Add button and file size appears at the bottom of the SmartMsg Send Message form. Be sure not to exceed any file-size limits set by your administrator.)

Message Expiration

By default, messages have a default “time to live” of 5 hours before it will expire, which means that the message will stop being delivered after 5 hours.

To Change the Message Expiration:

- In the second input box under “Message Expires in”, select the expiration unit (minutes, hours or days).
- In the first input box, enter the quantity desired.

Message expiration is calculated from time the message is actually delivered, rather than from the time that the message is created/submitted.

Snooze Option

The snooze option allows a recipient to delay reading/acknowledging a message. Snooze is allowed by default. For a very urgent, time-critical message, you may want to disable the snooze feature.

To Disallow the Snooze Option for a Message:

- Check the box labeled “Do not allow user(s) to snooze this message.” If this option is selected, recipients will not see a Snooze option on the message they receive.

Custom Responses (Surveys)

Custom response options allow gathering more specific replies to a message. Rather than merely clicking an “OK” button, the recipient will select options and/or enter free form text to reply to the message, based on the custom response design. This can prove a useful tool to quickly and easily gather information from any number of recipients.

To Use an Existing Custom Response Option for a Message:

- Click the Response tab if it is not the tab on top.
- Click ▼ button under “Custom Response options” to access the list of available custom responses. Click on the desired custom response.
- To sample the chosen custom response, click the Preview button and select a device type.

To Create a New Custom Response Option:

(You must have permissions to administer Custom Responses)

- Click the Response tab if it is not on top.
- Click the “New” button. (“None” must be chosen in the Custom Response Options list in order for the “New” button to be visible.)
- Type in a Response Name.
- Enter a Title for the Custom Response. (Recipients will see this title.)
- Click the +Add button and select a field type (button, radio button, check box or freeform text) from the drop-down list.
- Field text is “New.” Change the text for the field.
- Hit the Tab key to move to the next field. Notice the text change on the field in the preview window to the right. (Changes made to Custom Response are reflected in the preview area.)
- Check the submit option checkbox if you would like the survey to be submitted when the user selects this field. (For example: A “Done” button for the user to click to complete the survey.) **At least one field on the Custom Response must be selected to be a submit button.**
- The field can be moved around on the form by clicking and dragging with a mouse or by adjusting the x and y coordinate values.
- To modify a field after it has been added to the form, highlight the field in the Response Fields list (on the left) and change settings as desired.
- Click the OK button to save the Custom Response.

Templates

Templates allow saving and reusing message configurations. Templates may include recipient lists, message content, file attachments, custom response options, skins, security settings, and priority and expiration settings. A template can be used exactly as-is or can be loaded and altered to create a message – without changing the underlying template.

System Templates vs. Local Templates:

System Templates are saved to the SmartMsg database and are made available in the templates list for all (authorized) message senders.

Local Templates are saved to a local drive or a network drive. They are not uploaded to the system for other users.

To Create a New Template:

- Click the Templates Tab.
- Configure a message, as you would like to save for a template.
- Click the Save button.
- Type in a template name.
- Select Local Template or System Template. (For local templates, specify the path and filename.) *Note: Some users may not have permissions to create system templates.* Click OK.

To Use a Template to Create a New Message:

- Click the Templates Tab.
- Click the Open Button.
- Select a System Template from dropdown list of Available
-OR-
Select the Local Templates option and type in or browse to template path/filename (*.smt file).
- Modify any desired settings before clicking the Send button.

To Modify an Existing Template:

- Click the Open Button.
- Make desired changes. (Changes may include modifying text, adding an audio file, a custom response, etc.)
- Click the Save As button and enter a new name for the template.
- The template can be saved to the same location (as original template) or to a different location.
- Click Save and then OK to save the file.

Additional Message Security

Devices not contained within a SmartMsg network are, by default, considered non-secure (i.e. cell phone, pager, etc.) Your SmartMsg Administrator can designate which devices are secure on your system. For messages that are sensitive, you may want to limit their communication to devices specified as secure.

To Remove all Non-secure Devices from the Recipient List:

- Click the Security Tab. (bottom of Send Message form)
- Click on the Do Not Send To Unsecure Devices
- A confirmation message will appear. Click Yes.

To Require Users to provide password or PIN in order to receive a message: (This will force users to either Login to SmartMsg before they can see the alert message or enter a PIN code on their phone.)

- Select the checkbox labeled “Require Users to Reauthenticate...”
- This option is only available when above option (*Remove all non-secure devices.*) selected.

Skins

Use Custom Skins to give messages a different look and feel by incorporating different colors/ fonts/graphics.

To Select a Custom Skin for a Message:

- Click the Skin tab if it is not the current tab (if it is not on top).
- Click ▾ button under “Skin” and select from the drop-down list.

To Create a New Custom Skin:

The SmartMsg Skin Builder is available from two places:

- 1) SmartMsg Client – “Skins” tab in Client Settings.
- 2) SmartMsg Admin Tool – “System Skins” tab in Global Properties.

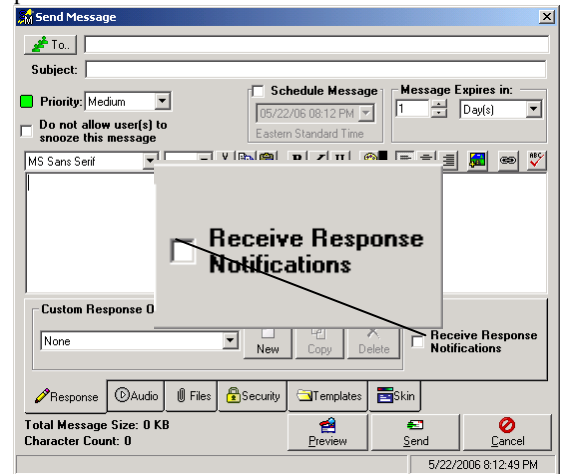
Message Response Log

The Response Viewer allows you to see message response information, such as which users have acknowledged a message, when and from which device they acknowledged and answers to custom response messages.

There are 2 ways to access the Response Viewer:

1) Automatically receive response notification information on your screen (after sending a message):

- Select “Receive Response Notifications” checkbox to automatically receive real-time responses reports beginning as soon as the first response is received.



2) Retrieve the Message Log:

The Message Log is accessible from the Client Dashboard.

- Click the Message Logs button.
- Click on the Sent Messages tab.
- Click Expired or Current tab.
- Single click the desired message (in grid).
- Click the Responses button.

OR from the SmartMsg Administrator Tool:

- Select View Message Log from the Servers Menu.

To Find Detail about How a Specific User Responded:

- Use one of the above methods for accessing the response viewer
- Single click on the desired user (in the grid).
- Click the View Detail button.

Device types

Keep in mind that SmartMsg alerts can be sent to Windows-based computers, voice and text devices. A single alert can reach all of these device types.

Computer Recipients

When an alert is sent to a Windows Client, the recipient sees what was in the Sender's Alert Window (what you see is what you get). The formatting you apply to the message body, including fonts, colors, bold, italics and underlining – all will appear to the recipient.

SMS Recipients (Pager and Cell phone text messaging)

If an alert is sent to an SMS text device, part of the message may be cut off because of limitations on the size of the message. Some cell phone service providers limit text length to 165 characters. That refers to ALL characters sent to the phone, including those sent by the service provider and alert prefixes sent by SmartMsg along with the message. For example, a message might contain 40 characters of data in the address and subject fields; this would leave 125 characters for the body of the message, for a provider that allows a limit of 165 characters. Note: Users have the ability to enable spanning a SmartMsg alert over multiple SMS messages, and thus allowing the user to receive a longer message in its entirety on an SMS device. Spanning can be configured per device, in user's device settings.

Phone Recipients (Text To Speech)

When a message is sent to an audio device (such as a phone, 2-way radio, etc.), the text in the Subject and Message areas is automatically converted to speech. It is important to follow best text to speech practices in order to deliver an acceptable audio message to these recipients. This needs to be taken into consideration when you create the text. Follow the guidelines below to create a text to speech message which is understandable for recipients using audio devices.

Text To Speech Guidelines and Suggestions

Use Periods and Commas to Create Pauses in the Speech.

- When typing the text, be sure to follow grammatical rules - using periods and commas.
- If you wish to insert a pause within a sentence, use a comma just as you would in a written document.
- Use additional periods to create pauses in other ways. This is especially important when using acronyms. For example, if you typed EMS in the alert, the vocalization of the text will sound like MMMZZ to the listener. To make sure the listener hears E M S, type it with a period between each letter (E.M.S.) to have the letters read individually.

Use additional periods in between sentences to create longer pauses. **When using periods for pauses, include a space before and after each period;** periods without spacing in between do not provide pauses. In the following example, the use of multiple periods (with spaces between) allows for significant pauses between the 2 sentences.

"the Fermi drill is terminated . . . I repeat . . . the Fermi drill is terminated. Thank you for all of your help."

Beware with Abbreviations.

Abbreviations are not normally recognized by Text to Speech software. Keep this in mind when drafting a text message that will be converted to Speech for audio devices. For example, rather than typing in "Dr. Smith", you would type "Doctor Smith". Your SmartMsg Administrator can add abbreviations (and acronyms) into the system's pronunciation dictionary to allow the abbreviation to be typed, but still be pronounced in audio messages as the actual word.

Utilize Spell Checker.

Spell check is always recommended – however, keep in mind that Spell Checker will not catch all mistakes. If you misspell an intended word, but it happens to be the correct spelling of a different word – of course, Spell Checker will not catch this. For example, if the word "think" is accidentally typed as "thin", no spell check warnings would appear.

*System-Wide Text-To-Speech Settings

Your SmartMsg Administrator can configure various Text-To-Speech system settings, such as making a different voice selection, adjusting the speed of the voice and defining entries in a pronunciation dictionary (rules for how the voice should pronounce specific words). These settings are system-wide, and therefore affect all users/messages on the system.

Use Spaces Between Numbers to be Read as Separate Digits.

When including a series of numbers in a message – such as an address – use a space in between each digit. This will ensure that the digits are read individually, rather than being read as one large number.

For example: A message with the address 22377 Pine street should be typed into the message as "2 2 3 7 7 Pine Street". This will ensure that the street number is spoken normally, rather than being spoken as *Twenty-two thousand, three hundred seventy seven.*

Preview your Message Before Sending.

It is always a good idea to preview a message before sending. By previewing the message, you can determine if the message audio can be easily understood. The preview button allows you to see how the message will appear (on computer screens) as well as to hear what the message will sound like spoken on a phone or other audio device. Upon preview of your message you may determine that additional pauses should be inserted (via commas or periods) or that some re-wording may be necessary in order to get a clear audio message.

