AUTOMATED APPOINTMENT REMINDER AND ANNOUNCEMENT SYSTEM

USER MANUAL

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INTRODUCTION

What Is SARS Messages?

SARS Messages is an automated email/text system that integrates with the SARS Anywhere scheduling and appointment system. SARS Messages enables the school to set up a variety of messages, such as appointment reminders and notices of appointment cancellations. Depending upon the software license that has been purchased, schools may send automated e-mail messages only, automated text messages only, or both.

SARS Messages also can be used to broadcast special messages. For example, prior to a deadline for fee payment, SARS Messages can be configured to send a reminder message to all students who have not yet paid their fees. Another type of broadcast message that may be used is for "early alerts." Students who are potential dropouts can be identified using various criteria in the system, then called to encourage them to stay in school.

SARS Messages is entirely flexible. Schools can configure each message grouping to create different messages for each purpose. Messages can be generated manually for one-time situations and automatically for routine appointment reminders.

Status reports itemize the messages that were completed, messages that were not completed, and incorrect email addresses or text phone numbers. This enables staff to focus follow up efforts only on those students who were not reached. It also provides a vehicle for identifying incorrect information that should be changed in the student database.

Where to Find Information

Information about how to set up and use SARS Track may be found in the following locations:

Client Zone in our website at www.sarsgrid.com:

- User Manual – Posted in PDF format.
- Preparation Guide – Posted in PDF format.

Within the Application:

- Help Files

When You Need to Contact Us

If you have a specific question and do not need the answer immediately, the person designated under the Support Agreement as our contact may send us a fax message at (415) 226-0038 or send an e-mail message to support@sarsgrid.com.

To speak directly with our customer support staff, the person designated under the Support Agreement as our contact person may call (415) 226-0040 during the following hours: Monday through Friday, 8:30 a.m. to 5:30 p.m. (PT).

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PART I -- GET STARTED

1.0 Overview

SARS Messages licenses are available in three different versions:

- ⇨ Email Only
- ⇨ SMS (Text) Only
- ⇨ Email and SMS (Text)

This Part contains information to help you install and set up the hardware and software, to start the program in the Windows Services, and to monitor the status log as follows:

1.1 Connect the Hardware Components

1.2 Install the Software Components

1.3 Start the SARS·Messages Service in Windows Services

1.1 Connect the Hardware Components

[Applicable only to colleges with a valid license for SMS (text) messaging]

A Multitech iSMS text server from a third party vendor is required for sending text messages. This server needs to be configured to be assigned a static IP address. Please refer to the following website of the manufacturer for instructions on configuring it for SARS Messages. http://www.multitech.com. After configuring the SMS Server, plug it into the network.

In addition, one or more SIM cards will be required. These are available through T-Mobile and may be ordered from SARS Software Products, Inc. Although T-Mobile makes claims that a single SIM card supports an unlimited number of text messages, in reality users are limited to 10,000 text messages per month per SIM card, beyond which T-Mobile disables the SIM card for the remainder of the month. Therefore, the college may need to purchase more than one SIM card in order to support the expected usage. Each SIM card can handle up to 10 texts per minute outbound and up to 5 texts per minute inbound.

1.2 Install the Software Components

The chart on the following page lists the programs that comprise SARS Messages. Each of these services must be installed on the SARS Messages server. The college's system license will determine which programs are activated.

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PROGRAM	RECOMMENDED USER	SMS ONLY OPTION	EMAIL ONLY OPTION	SMS AND EMAIL OPTION
SARS·Messages Establishes applications and their properties. Establishes messages.	System Administrator	X	X	X
SARS·Security Establishes users, access code, global and database settings.	System Administrator	X	X	X
SARS Messages Batch Creation Service Creates message batches to send to students. Resides in Windows Services.	Computer Staff	X	X	X
SARS Messages Email Processing Service Communicates with the email server to process email messages. Resides in Windows Services.	Computer Staff		X	X
SARS Messages File Upload Service Creates files to be imported to SARS Messages. Resides in Windows Services.	Computer Staff	X	X	X
SARS Messages Import Service Creates files to be imported to SARS Messages. Resides in Windows Services.	Computer Staff	X	X	X
SARS Messages Service Performs log maintenance and report processing for SARS Messages. Resides in Windows Services.	Computer Staff	X	X	X
SARS Messages Service Monitor Allows monitoring of Messages Services. Resides in Windows Services.	Computer Staff	X	X	X
SARS Messages SMS Processing Service Communicates with the ISMS (Intelligent Short Message Service) server to process text messages. Resides in Windows Services.	Computer Staff	X		X

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1.3 Start the SARS Messages Service in the Windows Services

The following programs reside in the Services section of Windows:

SARS·Messages Batch Creation Service
SARS Messages Email Processing Service
SARS Messages File Upload Service
SARS Messages Import Service
SARS Messages Service
SARS Messages Service Monitor
SARS Messages SMS Processing Service

Once they have been installed, started and set up to start automatically, no further action is generally required. If the SARS Messages server is shut down and later re-started, these programs components should be checked to ensure that they are still activated.

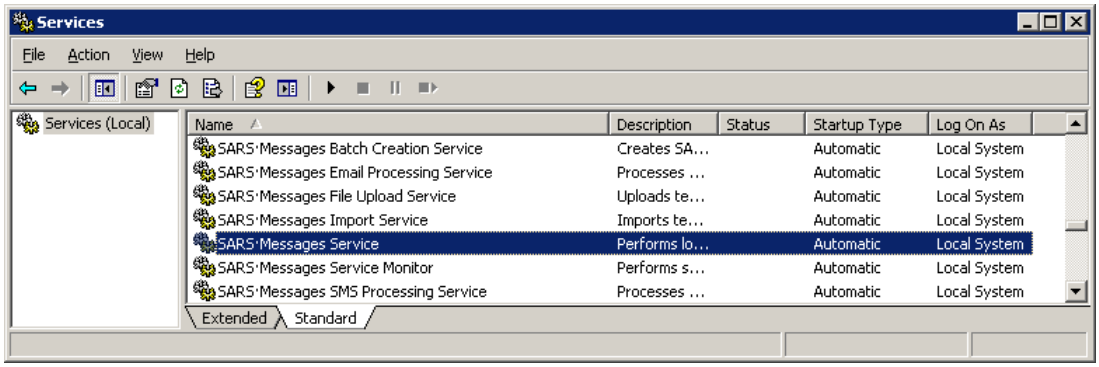
To gain direct access to the program in order to view settings, start, or stop the program, follow the steps below:

1. From the Windows desktop, click on START.

2. Click on CONTROL PANEL.

3. Click on ADMINISTRATIVE TOOLS.

4. Click on SERVICES. A list of programs will be displayed. They should be listed in alphabetical order. Here is an example:



5. To start, stop, pause, resume, or restart one of the services, right-click on the line containing that name. A drop-down menu will be displayed.

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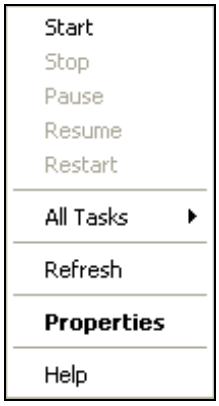
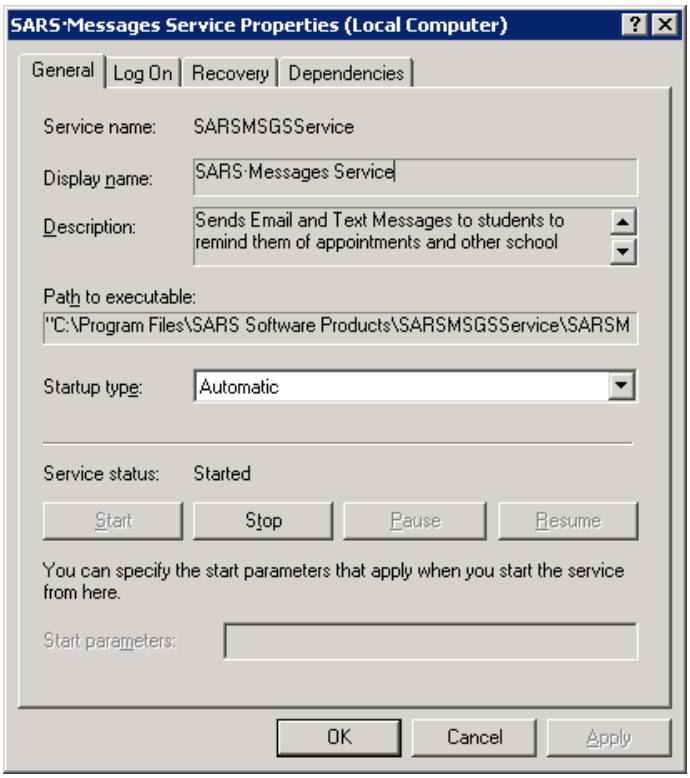
Here is an example:



6. Click on the desired option.

Note
The available options are dependent on the current status of the service.

7. To view and set up all of the details for a service, right-click on the program name and select PROPERTIES from the drop-down menu. Here is an example of the SARS·Messages Service properties screen, which defaults to the GENERAL tab:



a. Click on STARTUP TYPE ▼ and select AUTOMATIC. (The other options are MANUAL or DISABLED.)

b. If the Service status says “Stopped”, click on START.

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c. Click on OK.

Note
Upon returning to the list of Services, check the service that is being used by your college to make sure that the Status column reads “Started” and the Startup Type column reads “Automatic”.

8. When done, click on FILE and then on EXIT.

Note
Once a service is started, it should remain in that status unless (a) it is manually stopped or (b) the computer is turned off.

Additional Information

Users who have access rights to use SARS Messages will also be able to see whether each service is running, and will also be able to stop, pause, resume and restart a service from the Global Settings screen.

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PART II — SECURITY SETTINGS

2.0 Overview

The security of the system is controlled in large part through User Names, Access Codes and Databases. Therefore, we recommend that access to these functions be limited to one or two key individuals who will be granted permissions to work with the options in the SARS Security application.

This section discusses the SARS Security web application, which encompasses the establishment of Database Settings, Global Settings, User Names, and Access Codes.

2.1 Open and Close SARS Security
- 2.1.1 Initial Log In
- 2.1.2 Log In After Initial Setup
- 2.1.3 Close SARS Security

2.2 Database Settings
- 2.2.1 Establish Database Settings
- 2.2.2 Modify Database Settings
- 2.2.3 Delete a Database

2.3 Global Settings
- 2.3.1 Establish Global Settings
- 2.3.2 Modify Global Settings

2.4 User Accounts
- 2.4.1 Add a User Account
- 2.4.2 Change information about a User Account
- 2.4.3 Delete a User Account

2.5 Access Codes
- 2.5.1 Add an Access Code
- 2.5.2 Change Information about an Access Code
- 2.5.3 Delete an Access Code

2.6 Manage User Accounts

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2.1 Open and Close SARS·SECURITY

◆ REQUIRED ACCESS PERMISSION: ☑ ACCESS SARS·SECURITY

SARS Security is a web-based application that can be accessed from any computer. The SARS Messages system is delivered with one default user name: SSPI. The access code assigned to the default user allows access to all aspects of the SARS Security and SARS Messages operations.

2.1.1 Initial Log In

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college). The following Log In screen will be displayed:

2. Click on the USER NAME field and type the word SSPI.

3. Click on the PASSWORD field (any of these actions moves the cursor to the next field) and type the word ADMIN.

4. Click on LOGIN. A SARS Security welcome screen will be displayed.

5. It is recommended that you now add a default user name and password for the system administrator. To do this, proceed with the following steps.

6. Click on USER ACCOUNTS from the left-hand menu to display a USER ACCOUNTS screen. (You will see that one User Name (SSPI) is listed. **Do not delete this User Name. If you change the password, it is critical that you notify SARS Software Products, Inc.)**

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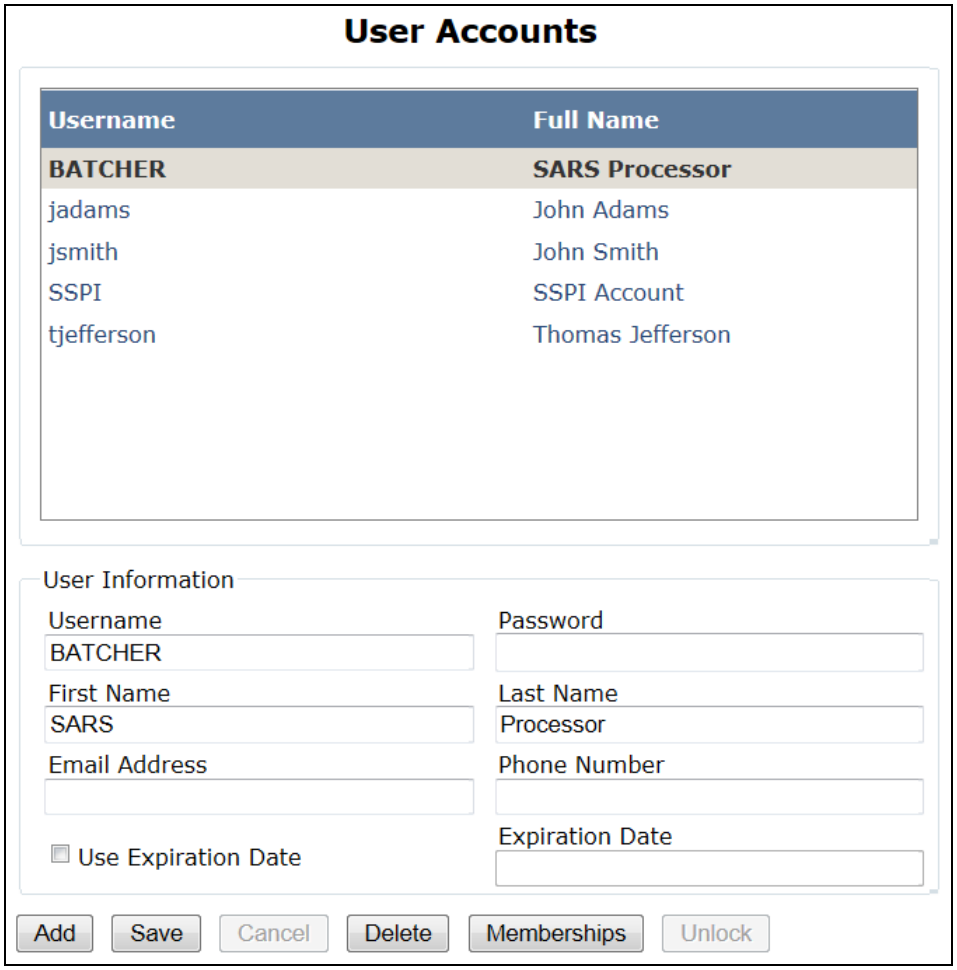
Here is an example of the screen:



a. Click on ADD. This will enable the User Information panel.

b. Click on the USERNAME field and enter a new User Name for the SARS·SECURITY system administrator. The field will accept up to fifty characters.

c. Click on the PASSWORD field and enter a unique password for this user. The password may be comprised of letters, digits, and special characters in any combination. The field will accept up to 255 characters.

d. Click on the FIRST NAME field, and type in the First Name of the Administrator.

e. Click on the LAST NAME field, and type in the Last Name of the Administrator. (The first and last names will be displayed on the screen as the Full Name after exiting and reentering the screen.)

f. Click on the EMAIL ADDRESS field and type in the email address for the Administrator. This will be used by the system to help the user re-set a forgotten password.

g. Click on the PHONE NUMBER field and type in the phone number for the Administrator.

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h. If this username should not be granted access to the SARS Security application after a certain date, click on USE EXPIRATION DATE. Then click on EXPIRATION DATE and type in the last date that the user will be permitted access to this application.

i. Click on SAVE.

Note
Additional users of the SARS Messages application will be created later. See Section 2.3.1 in this Part.

2.1.2 Log In to SARS Security after Initial Setup

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).

2. Log in using your newly-created user name and password.

3. Click on LOGIN.

2.1.3 Close SARS Security

To completely close the SARS Security application, close all screens and then click on LOG OFF from the left-hand menu.

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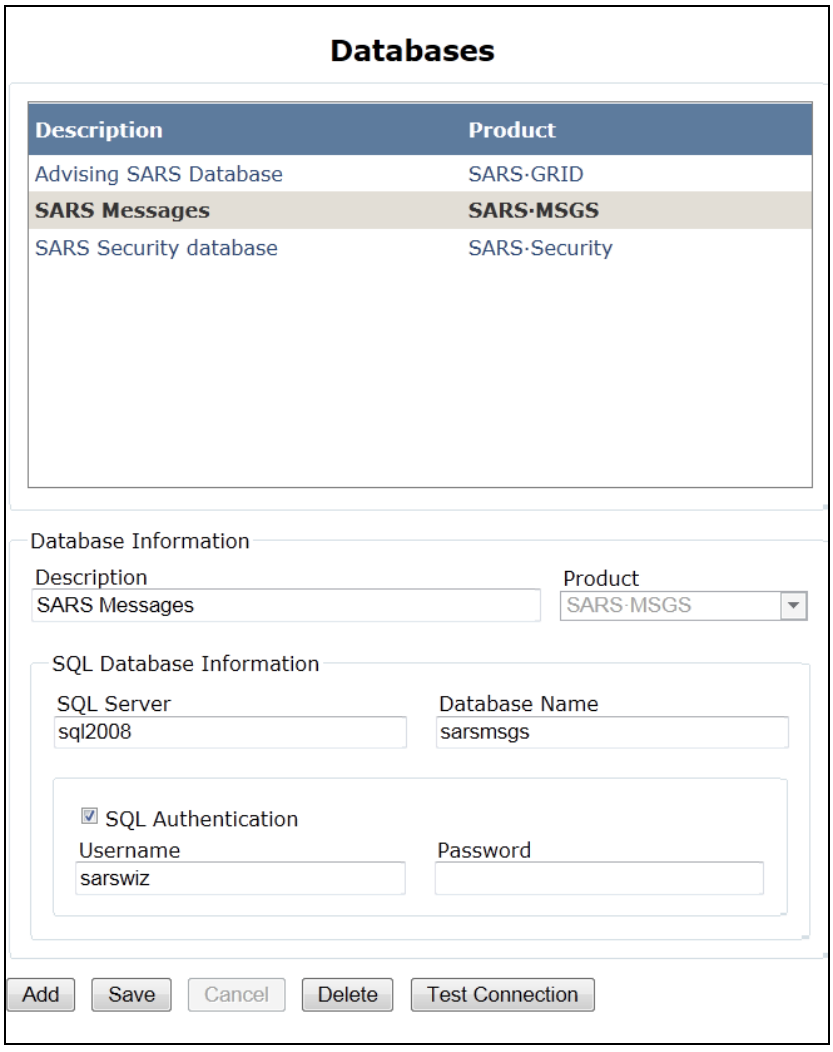
2.2 Database Settings

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ DATABASES - ADD
- OPTIONAL ACCESS PERMISSIONS: ☑ DATABASES - MODIFY
  ☑ DATABASES - DELETE

All the SARS products use one or more databases containing student information relevant to each application. In order to set up user accounts and assign permission to access information in the databases, each database needs to be specified in SARS Security. Users will be linked only to the databases to which they should have access. The database settings work in conjunction with user accounts and access codes.

Here is an example of the Databases screen:



The options are:

- DESCRIPTION/PRODUCT: Used to display the description of the database being used, as well as the SARS products that

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are using the database. Note that a pre-existing database will be listed called SARS Security Database.

- DATABASE INFORMATION:

  DESCRIPTION: Use to enter the description of the database.

  PRODUCT: Use to select the SARS product to associate with the database.

- SQL DATABASE INFORMATION:

  SQL SERVER: Type in the name of the SQL server.

  DATABASE NAME: Type in the name of the database associated with the SARS product.

  SQL AUTHENTICATION: Use to specify that SQL authentication will be required.

    USERNAME: Use to enter the username of the individual who must authenticate the SQL server.

    PASSWORD: Use to enter the password of the individual who must authenticate the SQL server.

- ADD: Use to enable fields in the Database panel for entry of information.
- SAVE: Use to save the entered information.
- CANCEL: Use to cancel the entries made on the screen before saving them.
- DELETE: Use to delete the selected Database.
- TEST CONNECTION: Use to test whether the connection to the database is properly configured.

2.2.1 Establish Database Settings

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).
2. Click on DATABASES from the left-hand menu to display the Databases screen.
3. Click on ADD.
4. Click on the DESCRIPTION field and type in the description of the database to be used with SARS Messages.
5. Click on PRODUCT ▼ and select the SARS product to associate with the database (e.g., SARS Messages). Depending on the products purchased by the college, the options may

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be: SARS Early Alert, SARS Anywhere, SARS Messages, SARS Plan, SARS Security, and SARS Track.

6. In the SQL Database panel,

   a. Click on SQL Server and then type in the name of the SQL Server.

   b. Click on DATABASE NAME and type in the name of the database.

   c. If SQL Authentication will be required, click on the SQL AUTHENTICATION checkbox. Then,

      a. Click on the USERNAME field and type in the username of the person who is authorized to authenticate to the database.

      b. Click on the PASSWORD field and type in the password of the username.

7. Click on SAVE.

8. Click on TEST CONNECTION and proceed to follow the prompt to ensure that the connection is established properly.

2.2.2 Modify Database Settings

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ DATABASES - ACCESS
  ☑ DATABASES - MODIFY

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).

2. Click on DATABASES from the left-hand menu to display the Databases screen.

3. Click on the line in the Description/Product box and select the database to be modified. It will be highlighted.

4. Make any desired changes in the Database Information panel.

5. Click on SAVE.

6. Click on TEST CONNECTION and proceed to follow the prompt to ensure that the connection is established properly.

2.2.3 Delete a Database

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ DATABASES - ACCESS
  ☑ DATABASES - DELETE

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).

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2. Click on DATABASES from the left-hand menu to display the Databases screen.

3. Click on the line in the Description/Product box and select the database to be deleted. It will be highlighted.

4. Click on DELETE. A confirmation screen will be displayed.

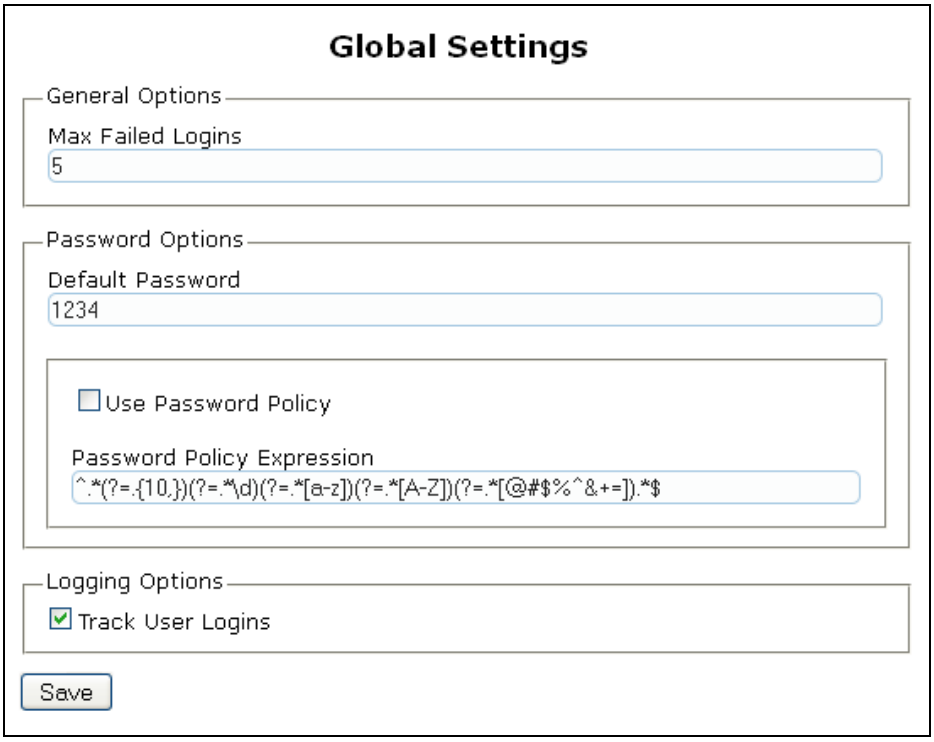
5. Click on OK. The database will be removed from the screen.

2.3 Global Settings

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ GLOBAL SETTINGS - ACCESS
- OPTIONAL ACCESS PERMISSIONS: ☑ GLOBAL SETTINGS - MODIFY

The Global Settings screen is used to establish options for controlling and monitoring the login security of the system. It is likely that, once these settings have been established, there will be no need to return to the screen.

Here is an example of the Global Settings screen:



The options are:

GENERAL OPTIONS:

MAX FAILED LOGINS: Use to specify the maximum number times that a user makes sequential failed attempts to login before the system locks out the user.

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- PASSWORD OPTIONS:

  DEFAULT PASSWORD: Use to enter a password that may initially be assigned to user accounts for initial login to SARS Messages. Upon gaining initial access, users will be prompted to set their own passwords.

  USE PASSWORD POLICY: Use to specify that a certain level of complexity will be required for passwords in order for them to be valid.

  PASSWORD POLICY EXPRESSION: Use to enter an expression of the required level of complexity for passwords to be valid.

- LOGGING OPTIONS:

  TRACK USER LOGINS: Use to establish a tracking log in the database that will keep track of users logging into all SARS products. The table will include the IP address of the computer used to log in, the date and time of the login, and the user name.

- SAVE: Use to save the entered information.

2.3.1 Establish Global Settings

◆ REQUIRED ACCESS PERMISSIONS:
- ☑ ACCESS SARS·SECURITY
- ☑ GLOBAL SETTINGS – ACCESS
- ☑ GLOBAL SETTINGS – MODIFY

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).
2. Click on GLOBAL SETTINGS.
3. In the General Options panel, click on the MAX FAILED LOGINS field and type in the desired number of sequential failed logins before the user account will be locked out. 0 will allow unlimited failed logins. 5 is recommended.
4. In the Password Options panel,
   a. Click on the DEFAULT PASSWORD field and type in the password that will be given to new users to initially access the system, at which point they will be required to set their own passwords.
   b. If desired, click on the USE PASSWORD POLICY checkbox to specify a required level of complexity for passwords. This will enable the PASSWORD POLICY EXPRESSION field, which displays as the default an expression requiring at least one upper case letter, at least one lower case letter, at least one number, and at least one special characters in order for a password to be valid. To retain the default expression, take no action. To modify the complexity level, type in the desired expression.

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5. In the Logging Options panel, click on the Track User Logins checkbox to establish a tracking log in the database by which every login will be recorded, specifying the user, IP address of the computer, and date and time of each login.

6. Click on SAVE.

2.3.2 Modify Global Settings

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ GLOBAL SETTINGS - ACCESS
  ☑ GLOBAL SETTINGS - MODIFY

If any Global Settings need to be modified, use the Global Setting screen to perform those actions. However, be advised that any modification will affect the entire universe of SARS applications.

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).

2. Click on GLOBAL SETTINGS.

3. Make any necessary changes.

4. Click on SAVE.

2.4 User Accounts

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ USERS - ADD

- OPTIONAL ACCESS PERMISSIONS: ☑ USERS - DELETE

The User Accounts screen is needed to create accounts for individuals who will be using SARS Messages either to control the settings in the SARS Security application or to work with one or more SARS Messages applications to create message batches, and/or generate reports. It may also be used to change information about, delete user accounts or set expiration dates for their access to the application. It is also used, after user accounts are established, to assign each Username to a product, a product filter, and an Access Code for that product filter.

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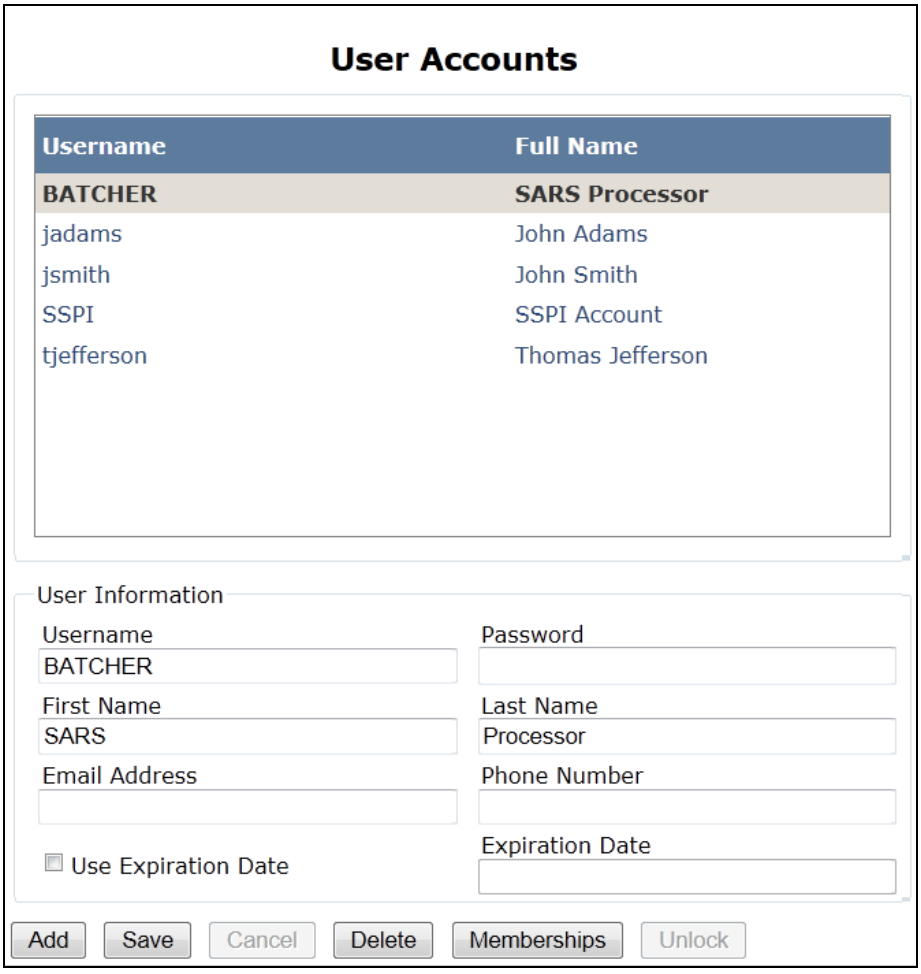
Here is an example of the USER ACCOUNTS screen:



The options on the USER ACCOUNTS screen are:

- USERNAME: Use to enter a user name. The field will accept up to 50 characters. Once a Username is created, it cannot be changed.
- PASSWORD: Use to enter a unique password for that user name. The field will accept up to 255 characters.
- FIRST NAME: Use to enter the first name of the user.
- LAST NAME: Use to enter the last name of the user.
- EMAIL ADDRESS: [Required] Use to enter the user's email address. This will be used to send reminders of forgotten passwords.
- PHONE NUMBER: [Optional] Use to enter the user's telephone number.

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- USE EXPIRATION DATE: Use to specify that this user may not use the SARS Messages system after a specified Expiration Date.
- EXPIRATION DATE: Use to type in the date after which the user will no longer have access to SARS Messages.
- ADD: Use to enable the User Name, Password, and Access Code fields to be available for entering an new user name.
- SAVE: Use to store the newly entered user name information.
- CANCEL: Use to cancel any entry if it has not yet been saved.
- DELETE: Use to delete a selected User Name.
- MEMBERSHIPS: Use to display a screen in order to assign the selected User Name to a product, application, and Access Code. (See Section 2.6 in this Part.)
- UNLOCK: Use to restore access to a locked user account.

2.4.1 Add a User Account

◆ REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
☑ USERS - ADD

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).
2. Click on USER ACCOUNTS from the left-hand menu to display the User Accounts screen.
3. Click on ADD to enable the fields in the User Information panel.
4. Click on USERNAME and type in the name of a user. Once a Username is created, it cannot be changed.
5. [Optional] Click on PASSWORD and type in that user's password. After information is typed into this field and saved, it will be subsequently appear as a blank field. If no entry is made in this field, the default password will be assigned.
6. Click on FIRST NAME and type in the user's first name.
7. Click on LAST NAME and type in the user's last name.
8. [Required] Click on EMAIL ADDRESS and type in the user's email address.
9. [Optional] Click on PHONE NUMBER and type in the user's telephone number.

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10. If the user should not be allowed access to SARS Messages after a certain date, click on the USE EXPIRATION DATE checkbox. Then click on EXPIRATION DATE and type in the date after which the user will be blocked from the system.

11. Click on SAVE.

12. Repeat steps 4 – 11 for other user names.

2.4.2 Change Information About a User Account

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ USERS - ADD

Once a User Name has been created, it cannot be changed. The information associated with that name may be modified, however, and the entire User Name may be deleted.

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).

2. Click on USER ACCOUNTS from the left-hand menu. This will display the User Accounts screen.

3. Click on the user name for which information is to be changed.

4. Make the applicable changes.

5. Click on SAVE.

2.4.3 Delete a User Account

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ USERS - DELETE

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).

2. Click on USER ACCOUNTS from the left-hand menu. This will display the User Accounts screen.

3. Click on the user name to be deleted. The name will be highlighted and the DELETE option will be enabled.

4. Click on DELETE. A confirmation message will be displayed.

5. Click on OK. The user account will be deleted from the list of users.

6. Click on CLOSE.

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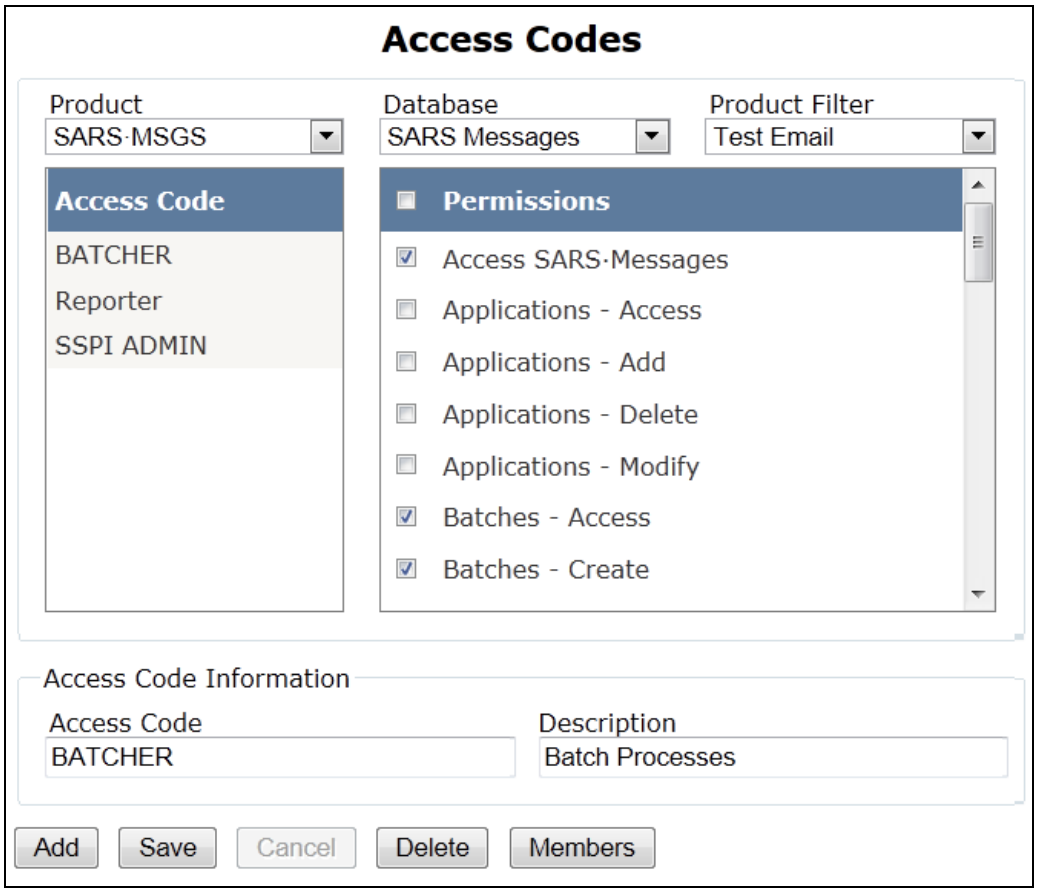
2.5 Access Codes

- REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
  ☑ ACCESS CODES - ADD
- OPTIONAL ACCESS PERMISSIONS: ☑ ACCESS CODES - DELETE
  ☑ ACCESS CODES - MODIFY

The Access Codes feature is used to add, delete, or change information on the categories of users (for example, system administrator, batcher, reporting). Each Access Code category is assigned permissions to perform or view selected functions. Then each User Name is assigned to an Access Code category using the Members feature (see Section 2.6 in this Part).

Access permissions will need to be assigned to each Access Code for a selected product.

Here is an example of the Access Codes screen:



The options are:

- PRODUCT: Use to select the SARS product for which Access Codes are to be created and assigned to User Names (e.g. SARS Messages or SARS Security).

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- DATABASE: Use to select the database associated with the selected product.
- PRODUCT FILTER: Use to select the application associated with the selected product (e.g., Advising Appointments).
- ACCESS CODE: Used to display a list of existing Access Codes.
- PERMISSIONS: Used to display a list of specific permissions, from which one or more may be selected for linkage to the selected access code.

SARS MESSAGES PERMISSIONS:

ACCESS SARS·MESSAGES: Use to assign users with the selected Access Code permission to log in to the SARS Messages application.

APPLICATIONS – ACCESS: Use to assign users with the selected Access Code permission to gain access to the Applications module in SARS Messages.

APPLICATIONS – ADD: Use to assign users with the selected Access Code permission to add an Application in SARS Messages.

APPLICATIONS – DELETE: Use to assign users with the selected Access Code permission to delete an Application in SARS Messages.

APPLICATIONS – MODIFY: Use to assign users with the selected Access Code permission to modify information about an Application in SARS Messages.

BATCHES – ACCESS: Use to assign users with the selected Access Code permission to gain access to the Batches screen in SARS Messages.

BATCHES – CREATE: Use to assign users with the selected Access Code permission to add batches in SARS Messages.

BATCHES – DELETE: Use to assign users with the selected Access Code permission to delete batches in SARS Messages.

BATCHES – MODIFY: Use to assign users with the selected Access Code permission to modify batches in SARS Messages.

EMAIL TEMPLATES – ACCESS: Use to assign users with the selected Access Code permission to gain access to the Email Templates screen in SARS Messages.

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EMAIL TEMPLATES – ADD:	Use to assign users with the selected Access Code permission to add Email Templates in SARS Messages.
EMAIL TEMPLATES – DELETE:	Use to assign users with the selected Access Code permission to delete Email Templates in SARS Messages.
EMAIL TEMPLATES – MODIFY:	Use to assign users with the selected Access Code permission to modify Email Templates in SARS Messages.
GLOBAL SETTINGS – ACCESS:	Use to assign users with the selected Access Code permission to gain access to the Global Settings screen in SARS Messages.
GLOBAL SETTINGS – CONTROL SERVICES:	Use to assign users with the selected Access Code permission to start, stop and restart services from the Global Settings screen in SARS Messages.
GLOBAL SETTINGS – MODIFY:	Use to assign users with the selected Access Code permission to modify Global Settings in SARS Messages.
MESSAGES – ACCESS:	Use to assign users with the selected Access Code permission to gain access to the Messages screen in SARS Messages.
MESSAGES – ADD:	Use to assign users with the selected Access Code permission to add messages to the Messages screen in SARS Messages.
MESSAGES – DELETE:	Use to assign users with the selected Access Code permission to delete messages on the Messages screen in SARS Messages.
MESSAGES – MODIFY:	Use to assign users with the selected Access Code permission to modify information on the Messages screen in SARS Messages.
REPORTS – APPLICATION:	Use to assign users with the selected Access Code permission to view and print Application Reports.
REPORTS – BATCH:	Use to assign users with the selected Access Code permission to view and print Batch Reports.
REPORTS – SERVICE:	Use to assign users with the selected Access Code permission to access the Service Report.
REPORTS – STATISTICAL:	Use to assign users with the selected Access Code permission to view and print Statistical Reports.

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SCHEDULE CODES – ACCESS:	Use to assign users with the selected Access Code permission to gain access to the Schedule Codes screen in SARS Messages.
SCHEDULE CODES – ADD:	Use to assign users with the selected Access Code permission to add Schedule Codes in SARS Messages.
SCHEDULE CODES – DELETE:	Use to assign users with the selected Access Code permission to delete Schedule Codes in SARS Messages.
SMS SERVERS – ACCESS:	Use to assign users with the selected Access Code permission to gain access to the SMS Servers screen in SARS Messages.
SMS SERVERS – ADD:	Use to assign users with the selected Access Code permission to add an SMS server in SARS Messages.
SMS SERVERS – DELETE:	Use to assign users with the selected Access Code permission to delete an SMS server in SARS Messages.
SMS SERVERS – MODIFY:	Use to assign users with the selected Access Code permission to modify information about an SMS server in SARS Messages.
SMS TEMPLATES – ACCESS:	Use to assign users with the selected Access Code permission to gain access to the SMS Templates screen in SARS Messages.
SMS TEMPLATES – ADD:	Use to assign users with the selected Access Code permission to add an SMS template in SARS Messages.
SMS TEMPLATES – DELETE:	Use to assign users with the selected Access Code permission to delete an SMS template in SARS Messages.
SMS TEMPLATES – MODIFY:	Use to assign users with the selected Access Code permission to modify information on an SMS template in SARS Messages.
SMTP SERVERS – ACCESS:	Use to assign users with the selected Access Code permission to gain access to the SMTP Servers screen in SARS Messages.
SMTP SERVERS – ADD:	Use to assign users with the selected Access Code permission to add an SMTP server in SARS Messages.
SMTP SERVERS – DELETE:	Use to assign users with the selected Access Code permission to delete an SMTP server in SARS Messages.

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SMTP SERVERS – MODIFY:	Use to assign users with the selected Access Code permission to modify information about an SMTP server in SARS Messages.
USER APPLICATION ASSIGNMENTS – MANAGE:	Use to assign users with the selected Access Code permission to assign a specific user to an application.

SARS·SECURITY PERMISSIONS:

ACCESS CODES – ADD:	Use to assign users with the selected Access Code permission to add Access Codes in SARS Security.
ACCESS CODES – DELETE:	Use to assign users with the selected Access Code permission to delete Access Codes in SARS Security.
ACCESS CODES – MODIFY:	Use to assign users with the selected Access Code permission to modify information about Access Codes in SARS Security.
ACCESS SARS·SECURITY:	Use to assign users with the selected Access Code permission to log in to the SARS Security application.
DATABASES – ADD:	Use to assign users with the selected Access Code permission to add databases in the SARS Security application.
DATABASES – DELETE:	Use to assign users with the selected Access Code permission to delete databases in the SARS Security application.
DATABASES – MODIFY:	Use to assign users with the selected Access Code permission to modify databases in the SARS Security application.
GLOBAL SETTINGS – ACCESS:	Use to assign users with the selected Access Code permission to gain access to the Global Settings module in the SARS Security application.
GLOBAL SETTINGS – MODIFY:	Use to assign users with the selected Access Code permission to modify global settings in the SARS Security application.
USER PERMISSIONS – ASSIGN:	Use to assign users with the selected Access Code permission to assign user permissions in the SARS Security application.
USERS – ADD:	Use to assign users with the selected Access Code permission to add users to the User Accounts screen in the SARS Security application.

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USERS – DELETE:	Use to assign users with the selected Access Code permission to delete users in the SARS Security application.
USERS – MODIFY:	Use to assign users with the selected Access Code permission to modify information about users in the SARS Security application.

- ACCESS CODE INFORMATION:

ACCESS CODE:	Use to type in the name of a new Access Code.
DESCRIPTION:	Use to type in a description of the associated Access Code.

• ADD:	Use to enable the Access Code Information panel for entry of new information.
• SAVE:	Use to store the new Access Code information.
• CANCEL:	Use to undo entries before they are saved.
• DELETE:	Use to delete the selected Access Code.
• MEMBERS:	Use to gain access to the Access Codes Members screen in order to assign User Names to the selected Access Code.

2.5.1 Add a New Access Code

◆ REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
☑ ACCESS CODES - ADD

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).
2. Click on the ACCESS CODES option from the left-hand menu to display the Access Codes screen.
3. Click on PRODUCT ▼ and select SARS·MSGS, the first product for which the Access Codes are to be created. (The other product is SARS Security.)
4. Click on DATABASE ▼ and select the database that has been associated with the selected product. (If only one database exists, it will be pre-selected.)
5. Click on PRODUCT FILTER ▼ and select the application associated with the selected Product and Database.

Note
For the SARS Security product, the PRODUCT FILTER field is not applicable.

6. Click on ADD to enable the fields in the Access Code Information panel. Then,

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a. Click on the ACCESS CODE field and type in the name of the new Access Code. The field will accept up to 50 characters.

b. Click on the DESCRIPTION field and type in a description of the Access Code.

c. Click on the applicable checkboxes adjacent to the permissions to be assigned to the selected Access Code.

7. Click on SAVE. The new Access Code will be placed on the list.

8. With the Access Code highlighted, click on MEMBERS to display an ACCESS CODE MEMBERS screen. Here is an example:

a. Click on the checkbox adjacent to each User Name who will be assigned the Access Code and its associated permissions. You may also click on the checkbox adjacent to the User Name title to assign all User Names to the selected Access Code.

b. Click on SAVE.

c. Click on CLOSE to return to the Access Codes screen.

9. Repeat steps 6 – 8 to add more Access Codes for the selected Product, Database and Product Filter.

10. Now repeat steps 3 – 9 to create Access Codes for the SARS Security application.

2.5.2 Change Information About an Access Code

◆ REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
☑ ACCESS CODES - MODIFY

Permissions that have been assigned to an Access Code may be added or deleted.

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1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).

2. Click on the ACCESS CODES option from the left-hand menu to display the Access Codes screen.

3. Click on PRODUCT ▼ and select the product for which the Access Code is to be changed. Select either SARS Messages or SARS Security.

4. Click on DATABASE ▼ and select the database that is associated with the selected product. (If only one database exists, it will be pre-selected.)

5. Click on PRODUCT FILTER ▼ and select the application associated with the selected Product and Database.

Note
For the SARS Security product, the PRODUCT FILTER field is not applicable.

6. Click on the Access Code to be changed from the Access Code List. The Description panel will display all permissions that have been selected. Then,

   a. Click on the checkbox adjacent to any permission to be added to the Access Code.

      -and/or-

      Click on any checked checkbox for any permission to be deleted from this Access Code.

7. Click on SAVE.

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2.5.3 Delete an Access Code

◆ REQUIRED ACCESS PERMISSIONS: ☑ ACCESS SARS·SECURITY
☑ ACCESS CODES - DELETE

Only unassigned Access Codes may be deleted. If any users are assigned to a particular Access Code that you wish to delete, first reassign those users to a different code. Then you may delete the newly unassigned Access Code by following the steps below.

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).

2. Click on the ACCESS CODES option from the left-hand menu to display the Access Codes screen.

3. Click on PRODUCT ▼ and select the product for which the Access Code is to be changed. Select either SARS Messages or SARS Security.

4. Click on DATABASE ▼ and select the database that is associated with the selected product. (If only one database exists, it will be pre-selected.)

5. Click on PRODUCT FILTER ▼ and select the application associated with the selected Product and Database.

Note
For the SARS Security product, the PRODUCT FILTER field is not applicable.

6. Click on the Access Code to be deleted from the Access Code List.

7. Click on DELETE.

8. A confirmation message will be displayed. Click on OK. The access code will be deleted from the list.

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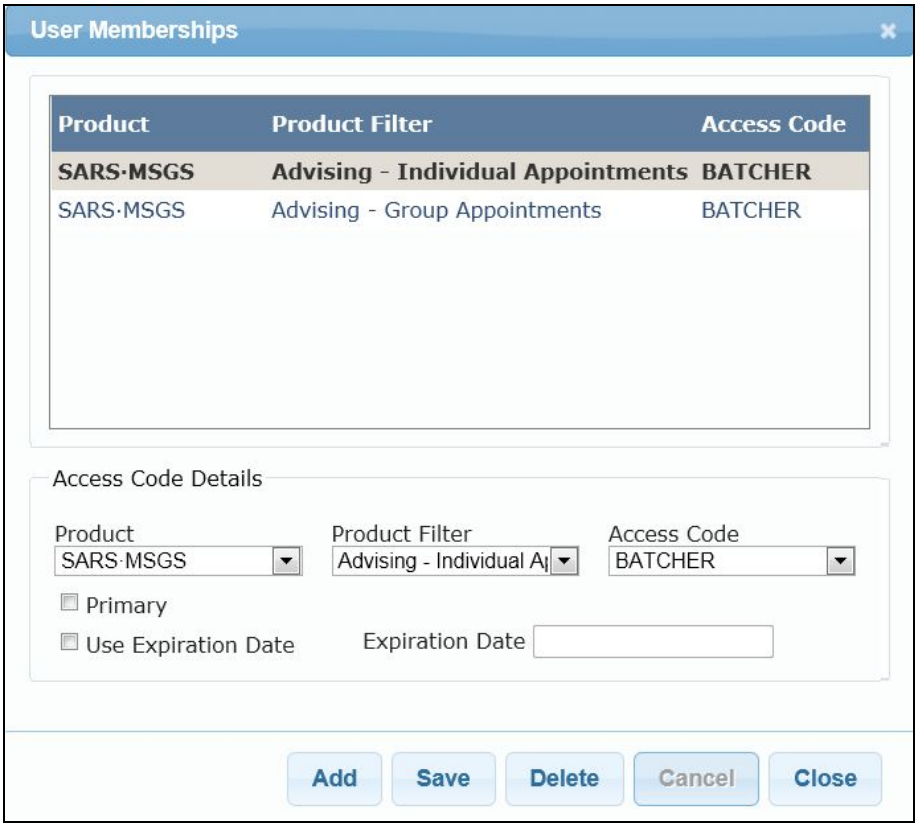
2.6 Manage User Accounts

◆ REQUIRED ACCESS PERMISSIONS:
☑ ACCESS SARS·SECURITY
☑ USERS - ADD
☑ USER PERMISSIONS - ASSIGN

Once User Accounts and Access Codes have been created, User Names will need to be assigned to one or more products, product filters, and Access Codes. These actions are performed from the User Memberships screen, which is available from the User Accounts screen.

Here is an example of the USER MEMBERSHIPS screen:



The options on the USER MEMBERSHIPS screen are:

- PRODUCT/PRODUCT FILTER/ACCESS CODE: Used to display a list of existing products and their attributes.

- ACCESS CODE DETAILS:

  PRODUCT: Use to select the SARS product for which Access Codes are to be created and assigned to User Names (e.g. SARS Messages or SARS Security).

  PRODUCT FILTER: Use to select the application associated with the selected product (e.g., Advising Appointments).

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ACCESS CODE:	Use to select the access code to be assigned to the user for the specified product and product filter.
PRIMARY:	Use to specify that a given product filter is the primary filter for a product.
USE EXPIRATION DATE:	Use to specify that this user may not have access to the selected product filter after a specified Expiration Date.
EXPIRATION DATE:	Use to type in the date after which the user will no longer have access to the selected product filter.
• ADD:	Use to enable the User Name, Password, and Access Code fields to be available for entering a new user name.
• SAVE:	Use to store the newly entered user name information.
• DELETE:	Use to delete a selected User Name.
• CANCEL:	Use to cancel any entry if it has not yet been saved.
• CLOSE:	Use to exit the screen.

1. Using your web browser, log in to the SARS Security application via the college's public website (to be provided by college).
2. Click on USER ACCOUNTS from the left-hand menu to display the User Accounts screen.
3. Click on the line containing the name of the user for whom Access Codes and products will be assigned. It will be highlighted on the list.
4. Click on MEMBERSHIPS to display the User Memberships screen.
5. Click on ADD to enable the fields in the Access Code Details panel.
6. In the Access Code Details panel,
   a. Click on PRODUCT ▼ and select SARS Messages, the first product for which the Access Codes are to be assigned. (The other product is SARS Security.)
   b. Click on PRODUCT FILTER ▼ and select the application associated with the selected Product.

   Note
   For the SARS Security product, the PRODUCT FILTER field is not applicable.

   c. Click on ACCESS CODE ▼ and select the access code to assign to the user for the selected product and application.

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d. Click on the PRIMARY checkbox if the selected options should be the user's primary settings. A user may only have one primary access code. The purpose of selecting a primary setting is that the system will default to that product and application when the user signs in to SARS Messages. If the Primary option is not checked, the user will need to select the desired product and application from a list, if the user is assigned to more than one.

e. To prevent the user from having access to the selected options after a specific date, click on the USE EXPIRATION DATE checkbox and then click on the EXPIRATION DATE field and type in the date after which the user will be blocked from the selected product, product filter and access code.

7. Click on SAVE.

8. Repeat steps 3 – 7 for each user, until all users have been assigned Access Code options.

SARS Messages is now set up for use.

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PART III — SET UP SARS·MESSAGES

3.0 Overview

This Part is intended for use by the SARS System Administrator and other designated users who may need to set up the parameters for email and/or SMS notifications. This section contains the information needed to set up SARS Messages (other than that needed for creating groupings, called batches, which is discussed in Part IV).

The set-up functions should be established in the following order:

3.1 Open and Close SARS Messages
- 3.1.1 Initial Log In
- 3.1.2 Log In to SARS Messages after Initial Setup
- 3.1.3 Close SARS Messages

3.2 Establish System-Wide Settings
- 3.2.1 Configure the Global Settings
- 3.2.2 Configure the SMS Servers
- 3.2.3 Configure the SMTP Servers

3.3 Establish Application Settings
- 3.3.1 Add a New Application
- 3.3.2 Rename an Application
- 3.3.3 Delete an Application

3.4 Create Messages
- 3.4.1 Create Message Descriptions
- 3.4.2 Create Email Templates
- 3.4.3 Create SMS (Text) Templates
- 3.4.4 Select Default Messages on the Application Settings Screen

3.5 Select Schedule Codes
- 3.5.1 Select Schedule Codes for each Application
- 3.5.2 De-select a Schedule Code

3.6 Establish Application Security
- 3.6.1 Add User Names and assign Access Codes
- 3.6.2 Delete User Names

3.7 Start the Services

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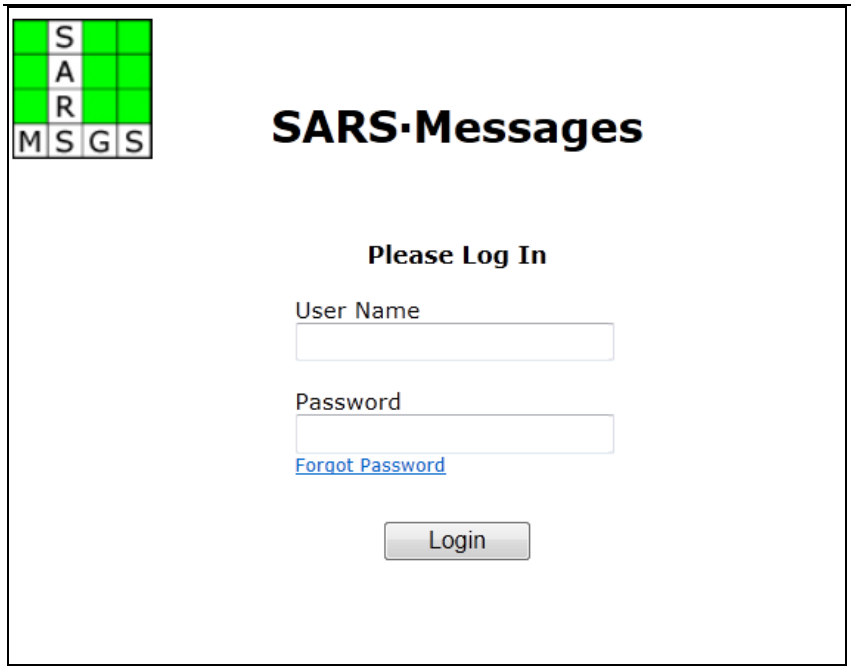
3.1 Open and Close SARS Messages

◆ REQUIRED ACCESS PERMISSION: ☑ ACCESS – SARS·MSGS

SARS Messages is a web-based program that can be accessed from any computer. The SARS Messages system is delivered with one default user name: SSPI. The default password for SSPI is "ADMIN." The access code "SSPI ADMIN" is assigned to the default user, and this user will initially have access to all aspects of the SARS Messages operations. Any other user accounts that have been created in SARS Security and have been assigned permission to use SARS Messages will be able to log in to this application using their assigned usernames and passwords.

3.1.1 Initial Log In

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college). The following Log In screen will be displayed.



2. Click on the USER NAME field and type in your Username.

3. Click on the PASSWORD field and type in the default Password provided by your system administrator.

4. Click on LOGIN. A message will prompt the user to create a unique password.

5. Type in the new password in response to the prompt.

6. A SARS Messages Welcome screen will be displayed with a menu of options on the left-hand side of the screen.

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3.1.2 Log In After Initial Set up

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college). The Log In screen will be displayed.

2. Click on the USER NAME field and type in your Username.

3. Click on the PASSWORD field and type in your unique Password.

   Note If you have forgotten your password, click on FORGOT PASSWORD. An email with instructions for resetting your password will be sent to the email address for the User Name that attempted to log in to SARS Messages. After resetting the password, re-attempt to log in.

4. Click on LOGIN. The SARS Messages Welcome screen will be displayed.

3.1.3 Close SARS Messages

To completely close the SARS Messages application, click on LOG OFF from the left-hand menu.

3.2 Establish System-wide Settings

System-wide settings will need to be established only once, unless system-wide changes are required in the future. There may be up to three screens to configure, depending on the license that the college has purchased.

3.2.1 Configure the Global Settings

[Applicable for any SARS Messages license]

3.2.2 Configure the SMS Settings

[Applicable only if the college has a valid license for text messaging]

3.2.3 Configure the SMTP Settings

[Applicable only if the college has a valid license for email messaging]

3.2.1 Configure the Global Settings

- REQUIRED ACCESS PERMISSIONS: ☑ GLOBAL SETTINGS – ACCESS
  ☑ GLOBAL SETTINGS – MODIFY

The Global Settings screen is used to set up system-wide options. It should be established upon initial set-up of SARS Messages and whenever a system-wide change needs to be made.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on GLOBAL SETTINGS from the left-hand menu to display the GLOBAL SETTINGS screen.

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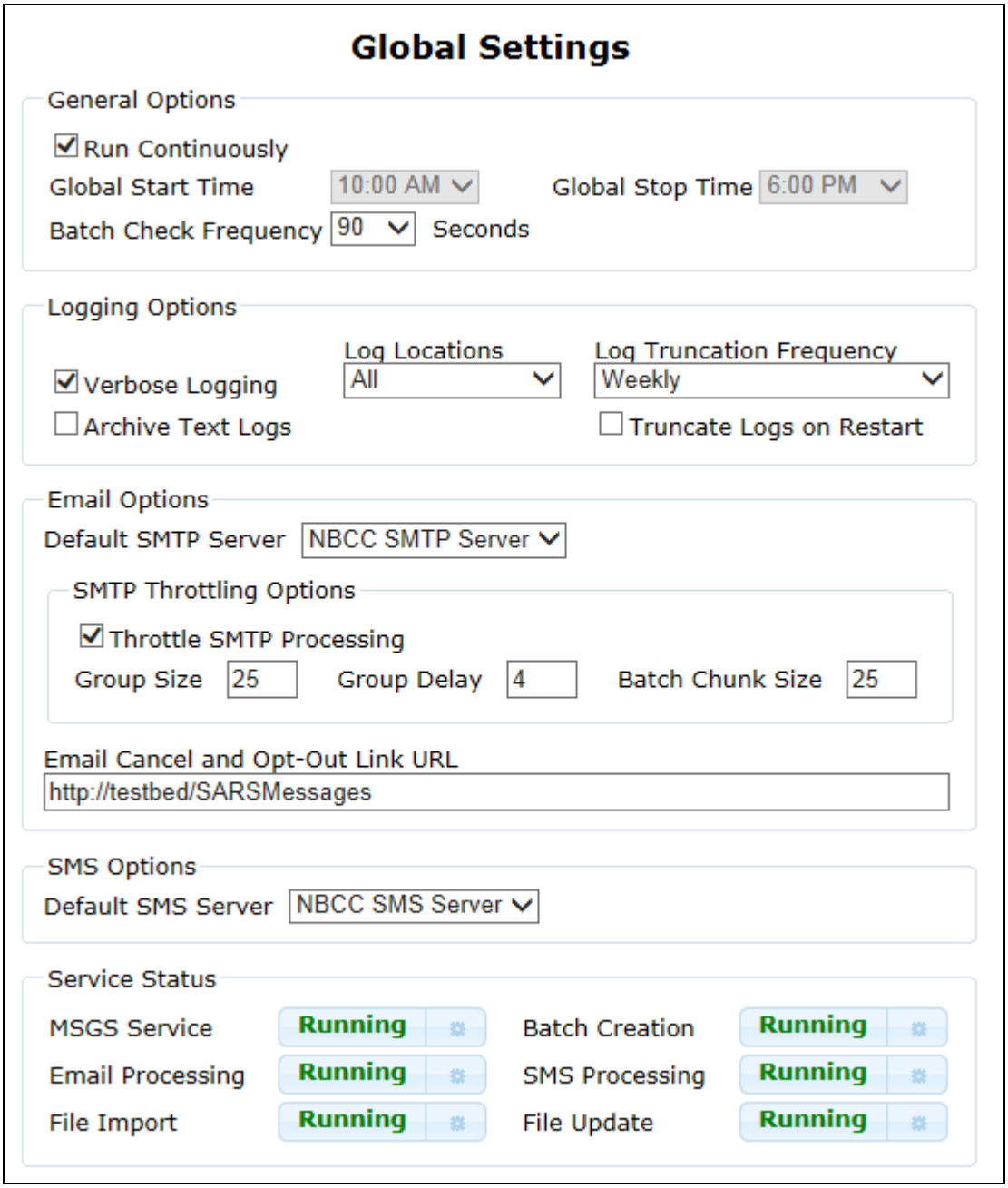
Here is an example:



The options are:

- GENERAL OPTIONS:

  RUN CONTINUOUSLY: Use to specify that the system should continually look for new batches to process.

  GLOBAL START TIME: [Enabled if Run Continuously is not selected] Use to select the earliest time at which the

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system should start looking for new batches to process.

GLOBAL STOP TIME: [Enabled if Run Continuously is not selected] Use to select the latest time at which the system should start looking for new batches to process.

BATCH CHECK FREQUENCY: Use to specify the frequency with which the system should check for new batches to be run (e.g. every 90 seconds).

- LOGGING OPTIONS: Use to specify the parameters for recording information about each action that occurs.

VERBOSE LOGGING: Use to specify that the logging actions will contain more information for use in troubleshooting. Note that this option may create larger files and slow down performance.

LOG LOCATIONS: Use to select one of four options for storing message logs.

ALL: Use to specify that message logs should be stored as Event Logs, Log files, and Database files.

EVENT LOG: Use to specify that message logs should be stored only as event logs.

LOG FILE: Use to specify that message logs should be stored only as text files.

DATABASE: Use to specify that message logs should be stored only in the database.

LOG TRUNCATION FREQUENCY: Use to select the frequency with which the log history will be cleared.

MANUAL: Select to clear the log only when it is done manually.

DAILY: Select to clear the log every 24 hours.

WEEKLY: Select to clear the log on a weekly basis.

ARCHIVE TEXT LOGS: Use to specify that the text files should be copied and archived every 24 hours. If this option is not selected, any existing text file logs will be cleared.

TRUNCATE LOGS ON RESTART: Use to select the option to clear the log history in the database files whenever the system is restarted.

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- EMAIL OPTIONS: [Enabled if the college has a valid license for email messages] Use to establish the system-wide settings for sending email messages.

  DEFAULT SMTP SERVER: Use to specify the SMTP Server that will be the used as the default for sending email messages.

  SMTP THROTTLING OPTIONS: Use to restrict the speed at which emails are sent out, in order to prevent the college from being blacklisted as a spammer by the email providers such as Google, Yahoo!, or Hotmail.

    THROTTLE SMTP PROCESSING: Use to specify that the speed at which the server sends emails should be restricted.

    GROUP SIZE: Use to specify the maximum number of students to be included in a single email batch. It is recommended that the group size be set at 50 or lower. 0 = unlimited.

    GROUP DELAY: Use to specify the number of minutes that should elapse between each email grouping. It is recommended that the group delay be set at 4–5 minutes.

    BATCH CHUNK SIZE: Use to specify the number of records to include in a single batch, to be processed at any one time. The ideal setting is between 25 and 50.

  EMAIL CANCEL AND OPT OUT LINK URL: [Use in conjunction with allowing students to cancel their appointments] Use to type in the path for the link to which students will be directed in order to complete their cancellation or opt out actions.

- SMS OPTIONS: [Enabled if the college has a valid license for SMS (text) messages] Use to establish the system-wide settings for sending text messages.

  DEFAULT SMS SERVER: Use to specify the SMS Server that will be the used as the default for sending text messages.

- SERVICE STATUS: Use to view or change the processing status of the various services.

  MSGS SERVICE: Use to see if the MSGS Service is running, or to start, stop, pause, resume, or re-start the service.

  EMAIL PROCESSING: Use to see if the Email Processing Service is running, or to start, stop, pause, resume, or re-start the service.

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FILE IMPORT:	Use to see if the Import Service is running, or to start, stop, pause, resume, or re-start the service.
BATCH CREATION:	Use to see if the Batch Creation Service is running, or to start, stop, pause, resume, or re-start the service.
SMS PROCESSING:	Use to see if the SMS Processing Service is running, or to start, stop, pause, resume, or re-start the service.
FILE UPDATE:	Use to see if the File Update Service is running, or to start, stop, pause, resume, or re-start the service.

- SAVE: Use to save new entries or changes made on the screen.

3. In the General Options panel,

   a. Click on the RUN CONTINUOUSLY checkbox to specify that the system should continually look for new batches to process, regardless of the time of day.

      -or-

      Click on GLOBAL START TIME ▼ and select the earliest time at which the system should start looking for new batches to process. Then click on GLOBAL STOP TIME ▼ and select the latest time at which the system should start looking for new batches to process. The options are listed in 30-minute increments.

   b. Click on BATCH CHECK FREQUENCY ▼ and select the frequency with which the system should check for new batches to be run. The range is 30 - 540 seconds.

4. In the Logging Options panel,

   a. Click on the VERBOSE LOGGING checkbox to specify that more information will be logged for use in troubleshooting.
   b. Click on LOG LOCATIONS ▼ and select one of four options for storing message logs. The options are: All, Event Log, Log File, or Database.

   c. Click on LOG TRUNCATION FREQUENCY ▼ and select the frequency with which the log history in the database files is to be cleared. The options are: Manual, Daily or Weekly.

   d. [Optional] Click on ARCHIVE TEXT LOGS to specify that the text files should be copied and archived. If this option is not selected, any existing text file logs will be erased whenever the log is cleared.

   e. [Optional] Click on TRUNCATE DATABASE FILES ON RESTART to specify that the database files should be cleared whenever the system is restarted.

5. [If the college has a valid license for Email Messages] In the Email Options panel,

   a. Click on DEFAULT SMTP SERVER ▼ and select the server that will be used for sending email messages.

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b. In the SMTP Throttling Options sub-panel,

i) Click on the THROTTLE SMTP PROCESSING checkbox to restrict the speed at which emails are sent out.

ii) Then click on the GROUP SIZE field and type in the maximum number of emails in a batch that should be sent at one time. 50 or fewer is recommended.

iii) Then click on the GROUP DELAY field and type in the number of minutes that should elapse between each email grouping. 4-5 minutes is recommended.

iv) Then click on the BATCH CHUNK SIZE field and type in the number of records to include in a single batch. 25-50 is recommended.

c. Click on the EMAIL CANCEL AND OPT OUT LINK URL field and type in the path of the link to which students will be taken to complete their cancellation actions or to opt out of receiving further email messages.

6. [If the college has a valid license for Text Messages] In the SMS Options panel, click on Default SMS Server ▼ and select the SMS server that will be used as the default for sending text messages.

7. Click on SAVE.

Note: The Service Status panel on the Global Settings screen may be used at any time to view or change the processing status of any or all of six services. The options are: Running, Start, Stop, Pause, Resume, and Restart.

3.2.2 Configure the SMS Servers

[Applicable only if the college has a valid license for SMS (text) Messaging]

- REQUIRED ACCESS PERMISSIONS: ☑ SMS SERVERS – ACCESS
  ☑ SMS SERVERS – ADD
- OPTIONAL ACCESS PERMISSIONS: ☑ SMS SERVERS – DELETE
  ☑ SMS SERVERS – MODIFY

If the college has a valid license for Text Messaging, a one-time setup step is necessary to establish the SMS Servers screen. If text messaging is not an option, skip to Section 3.2.3, Configure the SMTP Servers.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on the SMS SERVERS option from the left-hand menu to display the SMS Servers screen.

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Here is an example:

The options are:

- DESCRIPTION: Use to type in a description of the SMS Server to be used for sending text messages.
- SMS SERVER URL: Use to type in the website location of the SMS server.
- LOGIN REQUIRED: [Optional] Use to require a user to login with a username and password in order to have access to the SMS Server.
  - USERNAME: Use to type in the user name for the required login.
  - PASSWORD: Use to type in the password associated with the user name.
- ADD: Use to enable the fields for enter the SMS Server information.
- SAVE: Use to store the information that has been added.
- CANCEL: Use to abort any entries made on the screen.
- DELETE: Use to delete the selected SMS Server.

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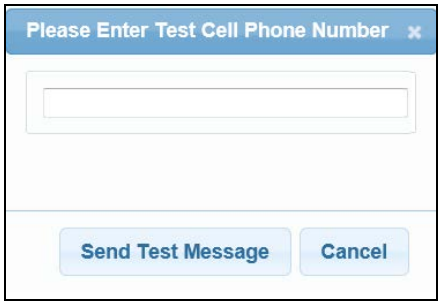
- TEST: Use to test the functionality of the SMS Server by sending a text message to your text phone.

3. Click on ADD to enable the fields on the screen. The cursor will be placed in the Description field.
4. Type in the description of the SMS Server (e.g., SARS MESSAGES SMS SERVER).
5. Click on the SMS Server URL field and type in the path of the SMS server.
6. If a Username and Password will be required for Logging in to the SMS Server,
   a. Click on the LOGIN REQUIRED checkbox.
   b. Click on USER NAME field and type in the authorized User Name.
   c. Click on the PASSWORD field and type in the password for the authorized user name.
7. Click on SAVE.
8. To test the settings, click on TEST. The following screen will be displayed:



   a. Type in your 10 digit cell phone number.
   b. Click on OK.
   c. Wait until you receive the text message on your cell phone. It will say, “This is a test SMS message from SARS Messages.”
   d. If the text message is received, the settings are functional.
9. Repeat steps 3 – 8 if additional SMS Servers need to be configured.

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3.2.3 Configure the SMTP Servers

[Applicable only if the college has a valid license for Email Messaging]

- REQUIRED ACCESS PERMISSIONS: ☑ SMTP SERVERS – ACCESS
  ☑ SMTP SERVERS – ADD
- OPTIONAL ACCESS PERMISSIONS: ☑ SMTP SERVERS – DELETE
  ☑ SMTP SERVERS – MODIFY

If the college has a valid license for email messaging, a one-time setup step (per application) is necessary to establish the SMTP ("Simple Mail Transfer Protocol") Server Settings screen for sending email messages between servers.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on the SMTP SERVERS option from the left-hand menu to display the SMTP Servers screen. Here is an example:

The options are:

- DESCRIPTION: Use to type in a description of the SMTP Server to be used for sending email messages.
- SERVER: Use to type in the DNS name or IP address of the SMTP server through which messages are to be sent.

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- PORT: Use to type in the port number on which the SMTP server listens for connections. This is typically port 25.
- SSL: Use to specify that SSL: (Secure Sockets Layer) security technology will be used to establish an encrypted link between the SMTP server and SARS Messages.
- LOGIN REQUIRED: [Optional] Use to enter credentials if a user must authenticate in order to send email messages via this SMTP Server.
  - USERNAME: Use to specify the username that must be entered if the Login Required option has been checked.
  - PASSWORD: Use to specify the password that must be entered if the Login Required option has been checked.
- ADD: Use to enable the fields for enter the SMTP Server information.
- SAVE: Use to store the information that has been added.
- CANCEL: Use to abort any entries made on the screen.
- DELETE: Use to delete the selected SMTP Server.
- TEST: Use to test the functionality of the SMTP Server by sending an email message to an email address of your choosing.

3. Click on ADD to enable the fields on the screen. The cursor will be placed in the Description field.
4. Type in the description of the SMTP Server (e.g., SARS MESSAGES SMTP SERVER).
5. Click on the SERVER field and type in the name of the email server.
6. Click on the PORT field and type in the number of the email server port.
7. Click on the SSL checkbox if SSL technology will be used with this server.
8. [Optional] If a Username and Password will be required for logging in to the SMTP Server,
   a. Click on the LOGIN REQUIRED checkbox.
   b. Click on USER NAME field and type in the authorized User Name.
   c. Click on the PASSWORD field and type in the password for the authorized user name.
9. Click on SAVE.

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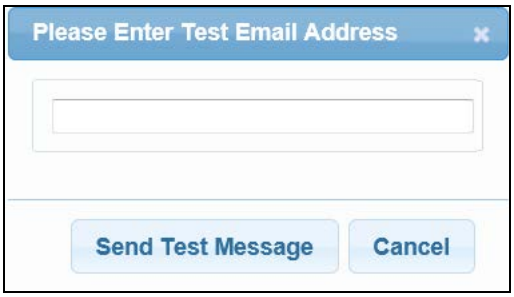
10. To test the settings, click on TEST. The following screen will be displayed:



   a. Type in your email address.

   b. Click on OK.

   c. Wait until you receive the email message. It will say, "This is a test message from SARS Messages."

   d. If the email message is received, the settings are functional.

11. Repeat steps 3 – 10 if any additional SMTP servers need to be configured.

3.3 Establish Application Settings

Different Applications should be created in SARS Messages for different purposes. Here are some examples of applications that may be integrated with SARS Anywhere for the purpose of sending appointment reminders or no show reminders to students:

Advising - Individual Appointments
Advising - Group Appointments
DSPS - Individual Appointments
EOPS - Individual Appointments
EOPS - Group Appointments

Here are some examples of applications that are NOT integrated with SARS Anywhere for the purpose of sending messages to students:

Late Fees
Parking Permit Applications
Registration Notices

Each application may be created, modified or deleted using the APPLICATION SETTINGS screen.

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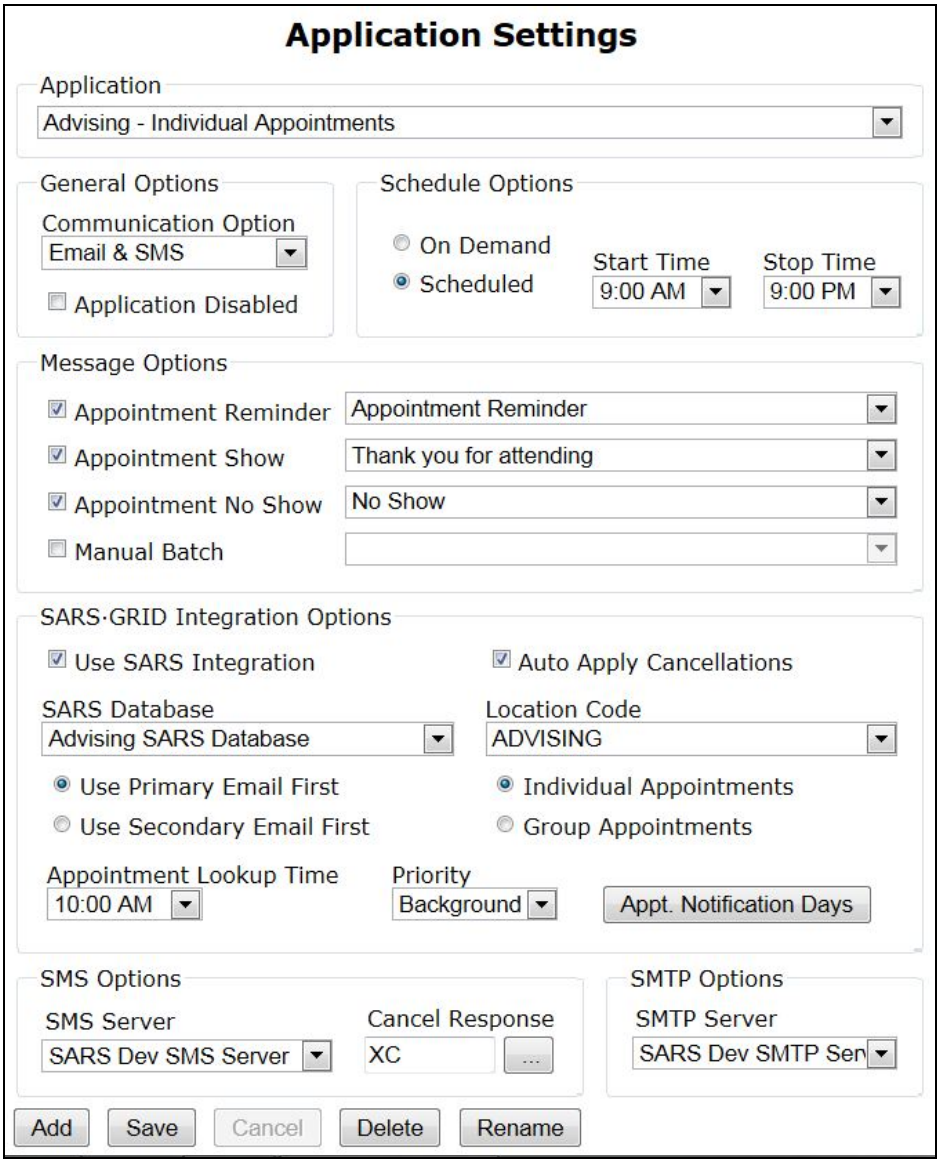
3.3.1 Add a New Application

- REQUIRED ACCESS PERMISSIONS: ☑ APPLICATIONS – ACCESS
  ☑ APPLICATIONS – ADD
- OPTIONAL ACCESS PERMISSIONS: ☑ APPLICATIONS – DELETE
  ☑ APPLICATIONS – MODIFY

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on APPLICATIONS from the left-hand menu. Here is an example of the screen:



The options are:

- APPLICATION: Use to type in the name of a new application.

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- GENERAL OPTIONS:

COMMUNICATION OPTION:	Use to select the desired message methods for this application. The options are:
EMAIL:	[Enabled only if the college has a valid license for Email and/or Email & SMS] Use to specify that only email messages may be created for this application.
SMS:	[Enabled only if the college has a valid license for SMS and/or Email & SMS] Use to specify that only SMS (text) messages may be created for this application.
EMAIL & SMS:	[Enabled only if the college has a valid license for Email & SMS] Use to specify that both Email and SMS (text) messages may be created for this application.
APPLICATION DISABLED:	Use to prevent the application from building a message batch for this application.

- SCHEDULE OPTIONS:

ON DEMAND:	Use to specify that batch processing will be performed when needed.
SCHEDULED:	Use to establish the time range for sending message batches or the application.
START TIME:	Use to select the earliest time of day for scheduling messages.
STOP TIME:	Use to select the last time of day for scheduling messages.

- MESSAGE OPTIONS:

APPOINTMENT REMINDER:	Use to enable the Reminder Message field in order to select a message template for reminder messages to be sent to students prior to their scheduled appointments for the selected application.
APPOINTMENT SHOW:	Use to enable the Appointment Show Message field in order to select a message template for messages to be sent to students who showed up for their appointments.
APPOINTMENT NO SHOW:	Use to enable the Appointment No Show Message field in order to select a message template for messages to be sent to students who did not show up for their appointments.

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MANUAL BATCH:	Use to enable the Manual Batch Message field in order to select a message template that will be selected by default when using the Manual Method, the Select from SARS·GRID Method, and/or the Import from External File Method.

- SARS·GRID INTEGRATION OPTIONS:

USE SARS INTEGRATION:	Use to enable the SARS GRID Integration Options panel options.
AUTO APPLY CANCELLATIONS:	Use to have the system automatically cancel any appointments in SARS Anywhere that have been cancelled by the student in response to a reminder message.
SARS DATABASE:	Use to select the specific SARS Anywhere database from which SARS Messages will "grab" appointment information. (If the default shown is incorrect, click on browse to find the desired database location.)
LOCATION CODE:	Use to select the specific department (such as Advising, Counseling, DSPS, or EOPS) for which to generate message groupings.
USE PRIMARY EMAIL FIRST:	Use to have SARS Messages select the student's primary email address of record when building a message group.
USE SECONDARY EMAIL FIRST:	Use to have SARS Messages select the student's secondary email address of record when building a message group.
INDIVIDUAL APPOINTMENTS:	Use to select the option to have the system send messages to students scheduled for individual appointments.
GROUP APPOINTMENTS:	Use to select the option to have the system send messages to students scheduled for group appointments.
APPOINTMENT LOOKUP TIME:	Use to select the time when the system will create the Appointment Reminder, Appointment Show, and Appointment No Show message batches.
PRIORITY:	Use to select the priority level of all batches in this application. The options are: Background, Low, Medium, High and Critical.
APPT. NOTIFICATION DAYS:	Use to establish the settings to represent the number of days before the scheduled appointment to send the message.

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- SMS OPTIONS: [Enabled only if the Application is using SMS Messages – see Application Settings]

  SMS SERVER: Use to specify the SMS (text) server that is being used by SARS Messages for this application.

  CANCEL RESPONSE: Use to enter a number or letter to be used by students to cancel an appointment. A different Cancel Response is required for each application.

  ...: Use to view Cancel Responses that are already in use by other applications.

- SMTP OPTIONS: [Enabled only if the Application is using SMS Messages – see Application Settings]

  SMTP SERVER: Use to specify the SMTP server that is being used by SARS Messages for this application.

- ADD: Use to enable the Application field to create a new application.

- SAVE: Use to store a new application and add it to the list.

- CANCEL: Use to cancel an entry of a new application before it has been saved. (The button is activated only when the ADD button has been pressed.)

- DELETE: Use to delete an existing application. (The button is activated only if an application name is selected.)

- RENAME: Use to change the name of the application.

3. Click on ADD. The Application field will be enabled for entering a new name, and the SAVE, CANCEL, and CLOSE buttons will also be enabled.

4. Click on APPLICATION and type in the name of the new application. The field will accept up to 255 characters.

5. In the General Options panel,

   a. Click on COMMUNICATION OPTION ▼ and select the method of communication to be used for this application. The options will be limited by the license that the college has purchased.

   b. Click on APPLICATION IS DISABLED if it is necessary to temporarily prevent SARS Messages from building and initiating message groups for this application. This option is useful when setting up the application, but it is a dynamic button. Any time that it is checked, messages will stop for all batches in that application and the application will stop looking for records and performing imports.

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6. In the Schedule Options panel,

   a. Click on the ON DEMAND button to specify that messages should be sent as soon as a message batch is created.

      -or-

   b. Click on the SCHEDULED button to specify a start and stop time for sending message batches. Then, click on START TIME ▼ to select the earliest time that message batches should be processed and click on STOP TIME ▼ to select the latest time that message batches should be processed.

7. For now, disregard the Message Options panel. These options will be completed after messages and message templates have been created. (See Section 3.4 below.)

8. In the SARS·GRID Integration Options panel,

   a. Click on the USE SARS INTEGRATION checkbox if you wish to link this application to SARS Anywhere for the purpose of finding and extracting appointment data.

   b. Click on the AUTO APPLY CANCELLATIONS checkbox to have the appointments automatically cancelled in SARS Anywhere if a student cancels the appointment after receiving a reminder message.

   c. Click on SARS DATABASE ▼ and select the SARS database that should be used with this application.

   d. Click on LOCATION CODE ▼ and select the SARS Anywhere Location associated with this application (e.g., ADVISING).

      Note
      The Location Codes displayed in the drop-down list will be limited to those Locations which are accessible to the user in SARS Anywhere.

   e. [Applicable if the college has a valid license for Email Messages] Click on USE PRIMARY EMAIL FIRST to have the system first attempt to send an email message to the student's primary email address.

      -or-

      Click on USE SECONDARY EMAIL FIRST to have the system first attempt to send an email message to the student's secondary email address.

   f. Click on INDIVIDUAL APPOINTMENTS if this application will be used to send message reminders regarding individual appointments. This option will cause the system to look for Schedule Codes associated with individual appointments when creating batches.

      -or-

      Click on GROUP APPOINTMENTS if this application will be used to send message reminders regarding group appointments. This option will cause the system to look for Schedule Codes associated with group appointments when creating batches.

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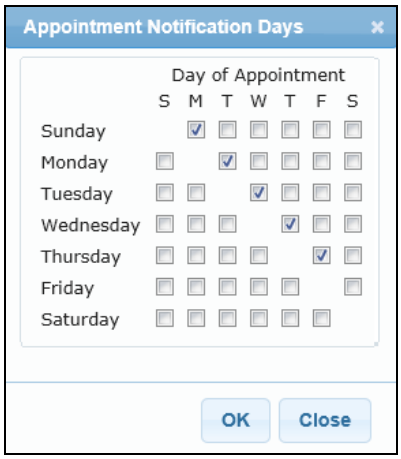
Note
The Schedule Codes for each application will be selected from a Schedule Codes selection screen (see Section 3.5).

g. Click on APPOINTMENT LOOKUP TIME ▼ and then select the earliest time that the system should look for appointments in the SARS database.

h. Click on PRIORITY ▼ and then select the priority level for the messages to be sent for this application. The options are: Background, Low, Medium, High, or Critical.

i. Click on APPT. NOTIFICATION DAYS to display the following screen:



The days on the left-hand side of the screen represent the day on which the message will be sent. The boxes under the days of the week are available to select the day of the appointment. In the example above, the selections will send a message one day in advance of the appointments for Monday through Friday appointments.

a) Click on the desired options.

b) Click on OK.

Note
The Notification Days screen provides a great deal of flexibility. For example, to send two reminders for a *Wednesday* appointment (one and two days in advance), simply click on the Tuesday box to send the message 1 day in advance and also click on the Monday box to send the message 2 days in advance. The screen would then look like this:

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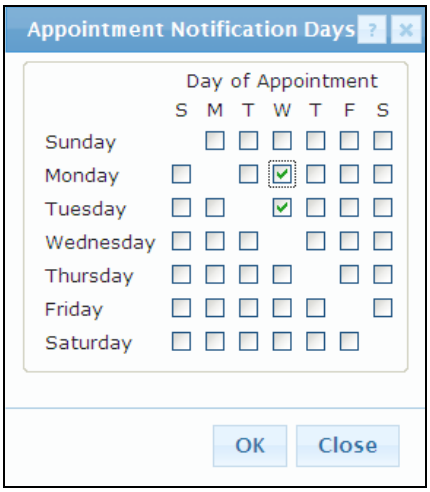
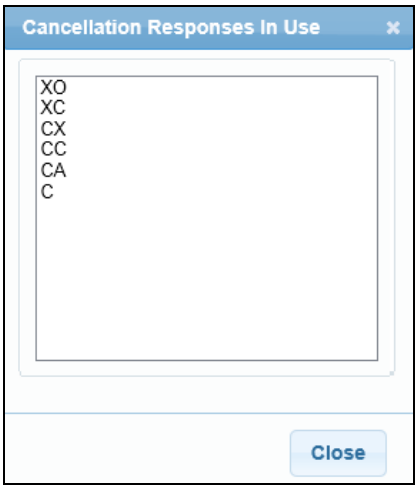


9. [Applicable if the college has a valid license for SMS (text) Messages] In the SMS Options panel,

   a. Click on SMS SERVER ▼ and then select the SMS Server to be used for this application.

   b. Click on the CANCEL RESPONSE field and type in the numbers or letters that students will be required to use to cancel their appointments (e.g. C for "cancel"). If the response is already in use by another application, the user will be prompted to select another one, since each application must use a unique code. Click on ... to view a list of cancel responses that are already in use. Here is an example:



      i) View the options that are already being used.

      ii) Click on CLOSE.

      iii) Type in a unique Cancel Response.

10. Click on SAVE.

11. Repeat steps 3 – 10 for each additional application that will be using SARS Messages.

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3.3.2 Rename an Application

◆ REQUIRED ACCESS PERMISSIONS: ☑ APPLICATIONS – ACCESS
☑ APPLICATIONS – MODIFY

If an application was created with a name that needs to be changed, it may be renamed by following the steps below:

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on APPLICATIONS from the left-hand menu.

3. On the Application Settings screen, click on APPLICATION ▼ and select the application to be re-named.

4. Click on RENAME. The APPLICATION field will change to accept revisions.

5. Type in the new name for the application.

6. Click on SAVE. The re-named application will be shown on the drop-down list.

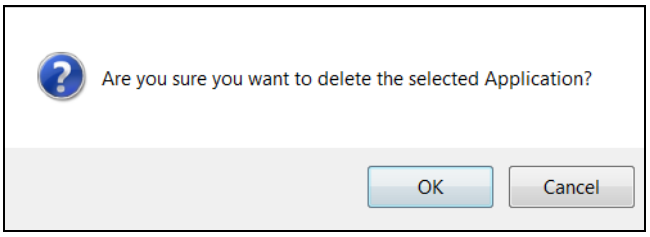
7. Click on CLOSE.

3.3.3 Delete an Application

◆ REQUIRED ACCESS PERMISSIONS: ☑ APPLICATIONS – ACCESS
☑ APPLICATIONS – DELETE

1. On the Application Settings screen, click on APPLICATION ▼ and select the Application to be deleted.

2. Click on DELETE. A confirmation message will be displayed. Here is an example:



3. Click on OK.

Warning
Exercise caution when deleting an application.

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3.4 Create Messages

Setting up messages requires a three-step process.

1. Create an email template and/or an SMS template
2. Create a description for each type of message to be sent via either email or text and assign a template to it.
3. Select for use on the Application Settings screen and/or batch processing.

3.4.1 Create Email Templates

[Available only if the college has a valid license for Email or for Email & SMS. If the college does not have a license for Email, skip to Section 3.4.2.]

- REQUIRED ACCESS PERMISSIONS: ☑ EMAIL TEMPLATES – ACCESS
  ☑ EMAIL TEMPLATES – ADD
- OPTIONAL ACCESS PERMISSIONS: ☑ EMAIL TEMPLATES – DELETE
  ☑ EMAIL TEMPLATES – MODIFY

An email editing screen is used to create email templates for a selected application. Email messages are Application-dependent and Location-dependent.

Tip
To retain a message that will be used on a frequent basis, create a separate application and then create the email message within that application.

This setup is required for each and every application and is performed using the EDIT TEMPLATES feature following the steps below.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on EMAIL TEMPLATES from the left-hand menu to display an Email Templates screen.

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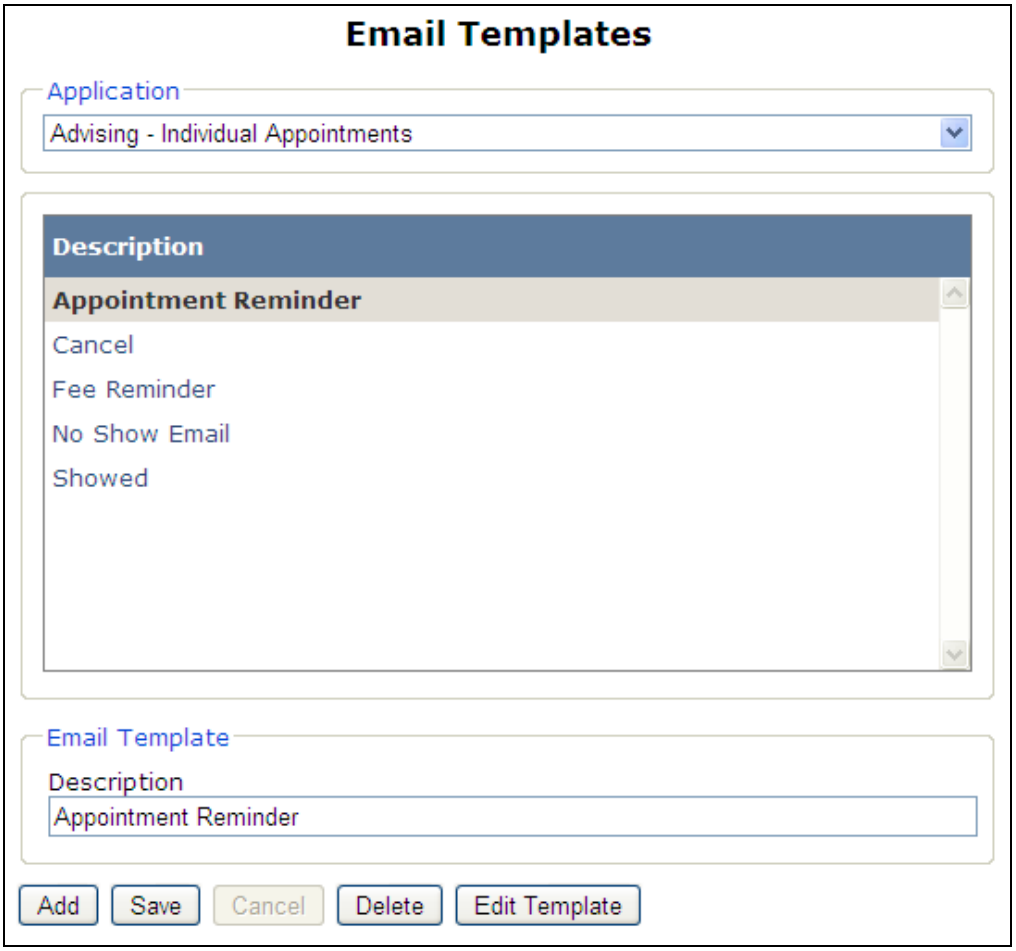
Here is an example:



The options are:

- APPLICATION: Use to select the application for which the messages are to be established.
- DESCRIPTION: Used to display a list of any existing messages for the selected application.
- ADD: Use to create a new email template.
- SAVE: Use to store the email template settings.
- CANCEL: Use to undo an action.
- DELETE: Use to delete an email template.
- EDIT TEMPLATE: Use to create or edit an email template.

3. Click on APPLICATION ▼ and select the application from the menu. Any existing message descriptions created for this application will be listed in the Description box.

4. To add another message description for an Email template,

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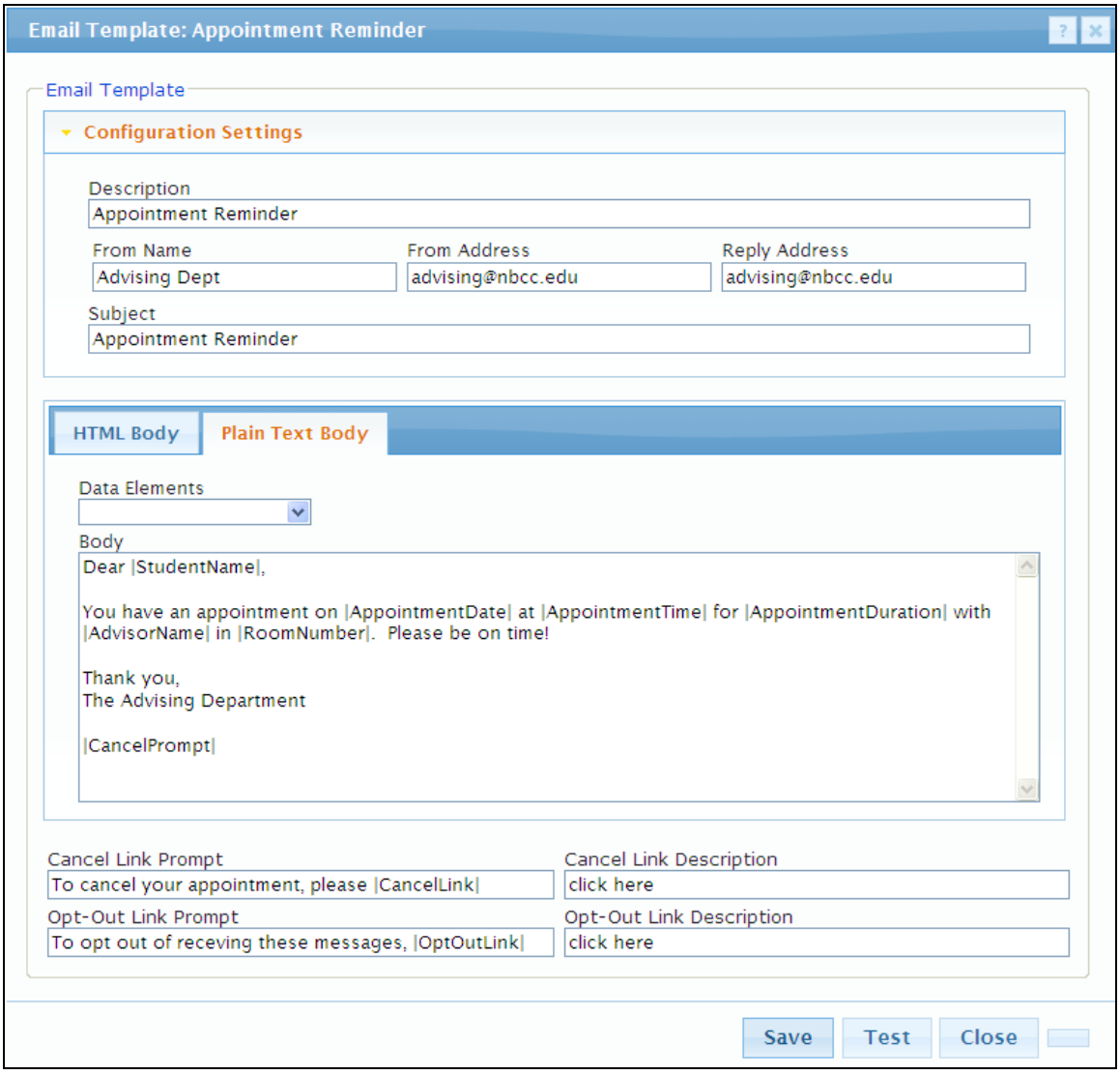
a. Click on ADD. This will enable the Email Template field.

b. In the DESCRIPTION field, type in the name of the email template (e.g., Appointment Reminder).

c. Click on SAVE. This will enable the EDIT TEMPLATE button.

5. With the desired template description highlighted, click on EDIT TEMPLATE to display an Email Template form. Here is an example:



The options are:

- CONFIGURATION SETTINGS: Use to establish the email settings for the template.

  DESCRIPTION: Used to display the description of the email template (e.g., Appointment Reminder). .

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FROM NAME:	Use to enter the name of the entity that will be sending the email messages.
FROM ADDRESS:	Use to enter the email address of the sender.
REPLY ADDRESS:	Use to enter the email address to which replies will be sent.
SUBJECT:	Use to type in the subject line of the email message. This will be displayed in the recipient's mailbox as the subject line.(e.g., Appointment Reminder from NBCC).

- DATA ELEMENTS: Use to select the following data elements, as needed, for insertion in the body of the message.

STUDENT NAME:	Use during the composition of the email message to have the system automatically insert the student's name in the body of the message.
ADVISOR NAME:	Use during the composition of the email message to have the system automatically insert the name of the advisor with whom the student has the appointment in the body of the message.
ROOM NUMBER:	Use during the composition of the email message to have the system automatically insert the advisor's room number in the body of the message.
APPOINTMENT DATE:	Use during the composition of the email message to have the system automatically insert the date of the appointment in the body of the message.
APPOINTMENT TIME:	Use during the composition of the email message to have the system automatically insert the time of the appointment in the body of the message.
APPOINTMENT DURATION:	Use during the composition of the email message to have the system automatically insert the duration of the appointment.
CANCEL PROMPT:	If students will be allowed to cancel their appointments after receiving the message, use to insert this data element as a new paragraph following the body of the message. This will to automatically place the Cancel Link Prompt wording at the end of the message.
CANCEL LINK:	Use to insert this data element into the CANCEL LINK PROMPT field immediately following the

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	Cancel Link Prompt wording. This will link the cancel prompt wording to the message.
OPT OUT PROMPT:	If students will be allowed to request to no longer receive messages from the college, use to insert this data element as a new paragraph following the body of the message. This will automatically place the Opt Out Link Prompt wording in the body of the message.
OPT OUT LINK:	Use to insert this data element in the OPT OUT LINK PROMPT field immediately following the Opt Out Prompt wording. This will link the opt out prompt to the message.
• PLAIN TEXT BODY:	[required] Use to create the body of the email message in plain text mode.
• HTML BODY:	[required] Use to insert a copy of the email message in HTML text mode.
• BODY:	Use to compose the wording for an email template.
• CANCEL LINK PROMPT:	Use to enter the desired wording if students will be allowed to cancel the appointment (e.g., "To cancel this appointment,"). Following the words, insert the Cancel Link Prompt option.
• CANCEL LINK DESCRIPTION:	Use to enter the desired wording for the cancellation link (e.g., "click here").
• OPT OUT LINK PROMPT:	Use to enter the desired wording if students will be allowed to opt out of receiving future email messages from the college (e.g., "To stop receiving messages from the college,"). Following the words, insert the Opt Out Link selection.
• OPT OUT LINK DESCRIPTION:	Use to enter the desired wording for the opt out link (e.g., "click here").
• SAVE:	Use to save the template.
• TEST:	Use to test the functionality of the email template by sending a message to your email address.
• CLOSE:	Use to exit the email templates screen.

Note The Email Template is a re-sizeable pop-up form.

6. If the CONFIGURATION SETTINGS panel is collapsed, click on the ▶ to open the panel. Then,

   a. Note that the DESCRIPTION field displays the name of the template to be edited (e.g., Appointment Reminder).

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b. Click on FROM NAME and type in the desired name of the sender (e.g., Student Services).

c. Click on FROM ADDRESS and type in the email address of the sender.

d. Click on REPLY ADDRESS and type in the email address to which replies will be sent.

e. Click on the SUBJECT field and type in the subject matter of the email template.

7. The email message must be created in both plain text and HTML. Follow the steps below:

   a. First click on PLAIN TEXT BODY and then click in the text box. Type the desired wording for the email template. At each point in which a Data Element must be inserted, click on DATA ELEMENTS ▼ and select the desired element. Continue until the template is completed.

   b. Next, highlight the wording in the body and click on Copy. Then click on HTML BODY and click on paste to insert the message into the text box.

8. [Optional - for use with Appointment Reminder messages] If students will be permitted to cancel the appointment,

   a. Click on the CANCEL LINK PROMPT field and type in the wording that will prompt students to cancel the appointment. Then, with the cursor placed immediately after the wording, click on DATA ELEMENTS ▼ and select |CancelLink|.

      Example: | To cancel this appointment, |CancelLink| |

   b. Click on the CANCEL LINK DESCRIPTION field and type in the wording for the link (e.g., "click here.").

      Example: | click here. |

9. [Required] To provide students the opportunity to opt out of receiving further email messages via SARS Messages,

   a. Click on the OPT OUT LINK PROMPT field and type in the wording that will prompt students to request that no further messages be sent from the college. Then with the cursor placed immediately after the wording, click on DATA ELEMENTS ▼ and select |Opt Out Link|.

      Example: | To stop receiving messages from the college, |OptOutLink| |

   b. Click on the OPT OUT LINK DESCRIPTION field and type in the wording for the link.

      Example: | click here. |

10. [Required] To provide students the opportunity to opt out of receiving further email messages via SARS Messages,

    a. Click on the OPT OUT LINK PROMPT field and type in the path or location of the link to which the student will be referred to complete the opt out request.

    b. Click on the OPT OUT LINK DESCRIPTION field and type in a description of the opt out link (e.g., Click here to opt out).

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Note While the values for the OPT OUT LINK PROMPT and OPT OUT LINK DESCRIPTION are required to be entered, using the Opt Out feature is optional when creating the body of an email message.

11. Click on SAVE.

12. Click on TEST to display the following screen:

    a. Click on the text field and type in your own email address.

    b. Click on SEND TEST MESSAGE.

    c. View the message that you receive in your email inbox. If it comes through and reads correctly, you are done with this template.

13. Click on CLOSE.

3.4.2 Create SMS Templates

[Available only if the college has a valid license for SMS or for Email & SMS. If the college does not have a valid SMS license, skip this section.]

- REQUIRED ACCESS PERMISSIONS: ☑ SMS TEMPLATES – ACCESS
  ☑ SMS TEMPLATES – ADD
- OPTIONAL ACCESS PERMISSIONS: ☑ SMS TEMPLATES – DELETE
  ☑ SMS TEMPLATES – MODIFY

An SMS editing screen is used to create SMS (text) templates for a selected application. Text messages are Application-dependent and Location-dependent.

Tip
To retain a message that will be used on a frequent basis, create a separate application and then create the text message within that application.

This setup is required for each and every application and is performed using the EDIT TEMPLATE feature following the steps below.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on SMS TEMPLATES from the left-hand menu to display an SMS Templates screen.

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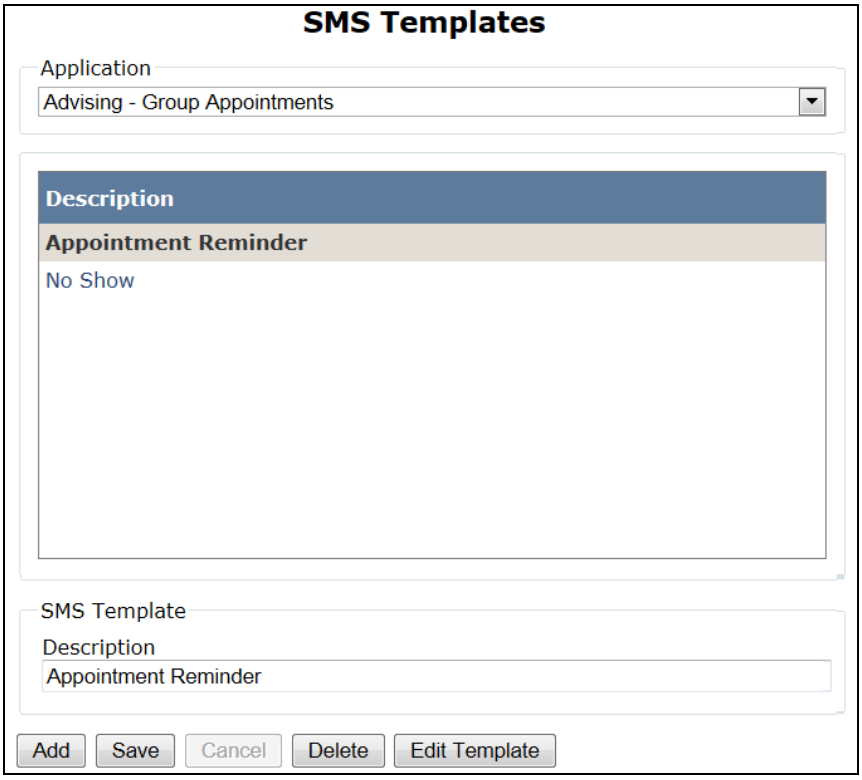
Here is an example:



The options are:

- APPLICATION: Use to select the application for which the SMS messages are to be established.
- DESCRIPTION: Used to display a list of any existing messages for the selected application.
- ADD: Use to create a new SMS template.
- SAVE: Use to store the SMS template settings.
- CANCEL: Use to undo an action.
- DELETE: Use to delete an SMS template.
- EDIT TEMPLATE: Use to create or edit an SMS template.

3. Click on APPLICATION ▼ and select the application from the menu. Any existing message descriptions created for this application will be listed in the Description box.

4. To add another description for an SMS template,

   a. Click on ADD. This will enable the SMS Template field.

   b. In the DESCRIPTION field, type in the name of the SMS template (e.g., Appointment Reminder).

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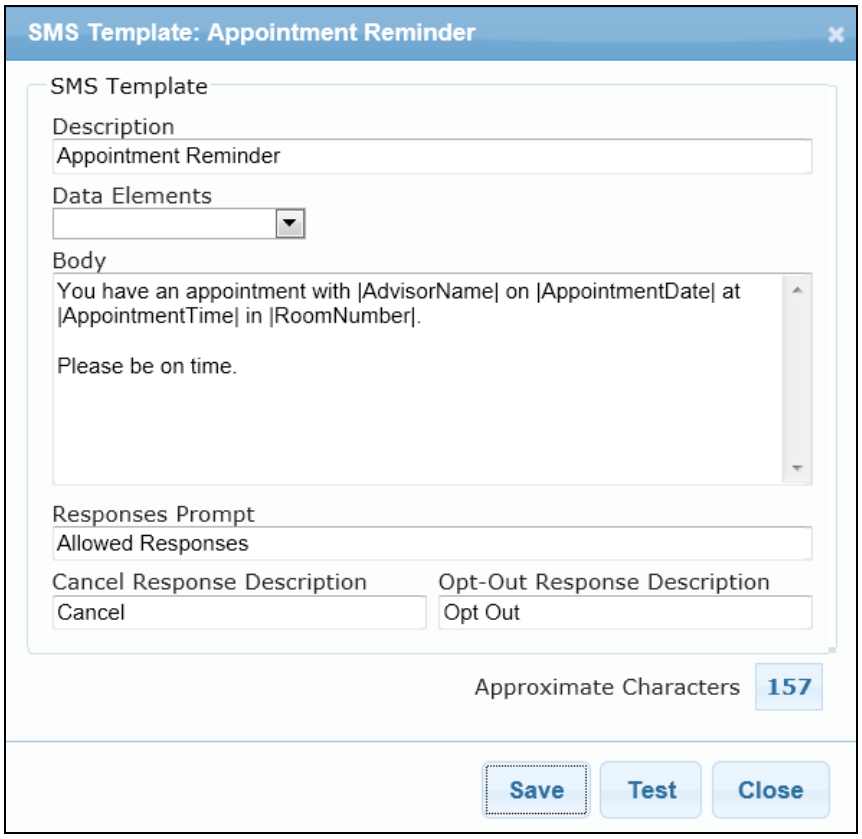
c. Click on SAVE. This will enable the EDIT TEMPLATE button.

5. With the desired template description highlighted, click on EDIT TEMPLATE to display an SMS Template form. Here is an example:



The options are:

- DESCRIPTION: Use to type in a description of the text message (e.g., Appointment Reminder).
- DATA ELEMENTS: Use to select the elements to be inserted in the appropriate area of the text message. The options are: Student First Name, Student Last Name, Student Full Name, Advisor Name, Room Number, Appointment Date, Appointment Time, and Appointment Duration.
- BODY: Use to compose an SMS template, inserting data elements as part of the text.
- RESPONSES PROMPT: Use to type in the words to be viewed by the students to prompt them for responding to the message (e.g., Allowed Responses).
- CANCEL RESPONSE DESCRIPTION: Use to type in the description of the Cancel response (e.g., Cancel).

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- OPT-OUT RESPONSE DESCRIPTION: Use to type in the description of the Opt-out response (e.g., Opt out).
- APPROXIMATE CHARACTERS: Use to view the approximate character count as you are typing the body of the message. Up to 160 characters are available before the body of the message wraps into a second text message. The count is an approximation because some of the inserted values will not have the same character length (e.g., |AdvisorName|).
- SAVE: Use to save the SMS template.
- TEST: Use to test the functionality of the SMS template.
- CLOSE: Use to exit the SMS templates screen.

Note The SMS Template is a re-sizeable pop-up form.

6. Note that the DESCRIPTION field displays the name of the template to be edited (e.g., Appointment Reminder).

7. Click in the box under BODY and start to type the template. At each point in which a Data Element must be inserted, click on Data Elements ▼ and select the desired element. Continue until the template is completed. Here is an example:

   You have an appointment with |Advisor Name| on |Appointment Date| at |Appointment Time| in |Room Number|. Please be on time.

   Note It is recommended that text messages not contain salutations, such as *Dear |Student Name|*, as this will unnecessarily raise the character count.

8. In the Responses Prompt panel,

   a. [Required] Click on the RESPONSES PROMPT field and type in the text that will be viewed by the student if cancellation or opt-out responses are allowed (e.g., “Allowed Responses”).

   b. [Optional] Click on the CANCEL RESPONSE DESCRIPTION field and type in the cancellation response to be displayed to the student (e.g., Cancel).

   c. [Required] Click on the OPT OUT RESPONSE DESCRIPTION field and type in the opt-out response to be displayed to the student (e.g., Opt out).

9. Click on SAVE.

10. Click on TEST to display the following screen:

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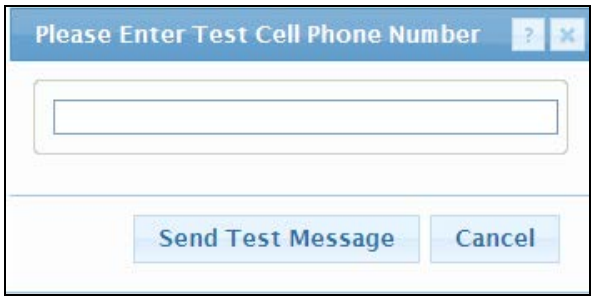

a. Click on the text field and type in your own cell phone number.

b. Click on SEND TEST MESSAGE.

c. View the text message that you receive on your phone. If it comes through and reads correctly, you are done with this template.

11. Click on CLOSE.

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3.4.3 Create Message Descriptions

- REQUIRED ACCESS PERMISSIONS: ☑ MESSAGES – ACCESS
  ☑ MESSAGES – ADD
- OPTIONAL ACCESS PERMISSIONS: ☑ MESSAGES – DELETE
  ☑ MESSAGES – MODIFY

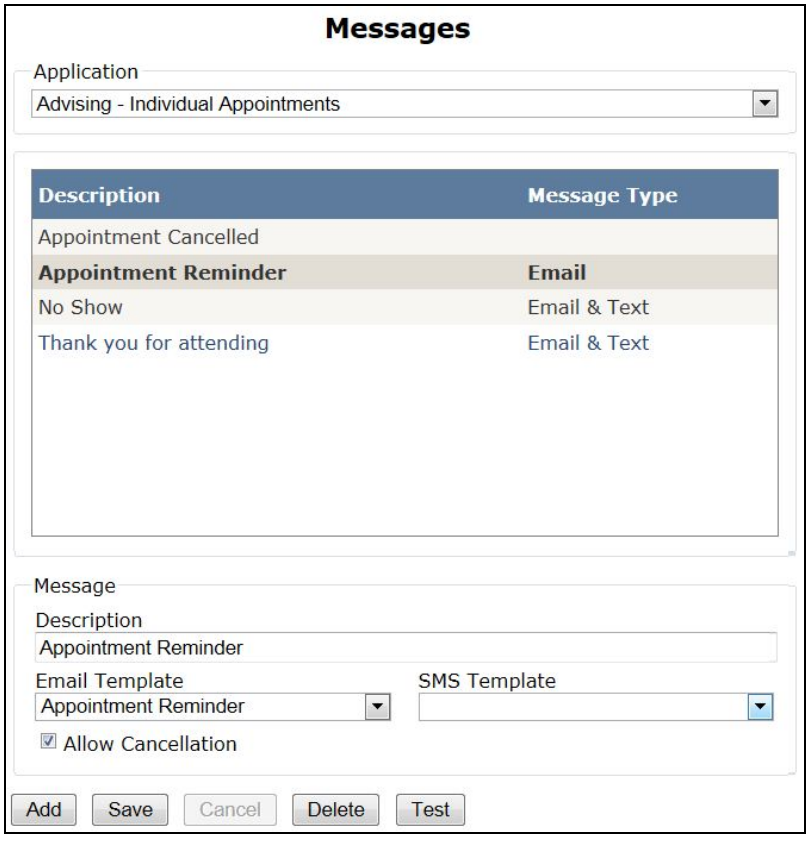
Four types of messages should be created for routine automated processing. They are:

- Appointment Reminder
- Appointment Show
- Appointment No Show
- Manual Batch

It is recommended that message descriptions and templates be created for these types of messages, if they will be used by a particular application.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on MESSAGES on the left-hand menu to display the Messages screen. Here is an example:



The options are:

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- APPLICATION: Use to select the application for which the messages are to be established.
- DESCRIPTION/MESSAGE TYPE: Used to display a list of any existing messages for the selected application. Also used to specify, for each message, the type (EMAIL, SMS, or EMAIL & SMS).
- MESSAGE:
  - DESCRIPTION: Use to type in the name of the message for which email and/or SMS templates are to be composed.
  - EMAIL TEMPLATE: [Available only if the college has a valid license for Email] Use to select email message template.
  - SMS TEMPLATE: [Available only if the college has a valid license for SMS (text)] Use to select an SMS message template.
  - ALLOW CANCELLATION: Use to permit students to cancel their appointments in response to receiving appointment reminder messages.
- ADD: Use to create a new message name for this application.
- SAVE: Use to store the message settings.
- CANCEL: Use to undo an action.
- DELETE: Use to delete a message for this application.

3. Click on ADD.
4. In the Message panel,
   a. In the DESCRIPTION field, type in the name of a message (e.g., Appointment Reminder).
   b. Click on ALLOW CANCELLATION if message pertains to an appointment reminder and the student will be permitted to cancel the appointment when the message is received.
   c. If the message has a corresponding email template, click on EMAIL TEMPLATE ▼ and selected the relevant template.
   d. If the message has a corresponding SMS template, click on SMS TEMPLATE ▼ and selected the relevant template.
   e. Click on SAVE.
5. Repeat step 4 to add other message descriptions for the same application.
6. Repeat steps 3 – 4 for other applications, as needed.

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3.4.4 Select Default Messages on the Application Settings Screen

Once message descriptions and their related templates have been created, go back to the Application Settings screen and select them for use.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on APPLICATIONS from the left-hand menu.

3. Click on APPLICATION ▼ and select the application. All of the fields for that application should be populated with data previously entered.

4. In the Message Options panel,

   a. [Optional] Click on the Appointment REMINDER checkbox to enable a message reminder option for this application. Then click on the adjacent field ▼ and select the description of the Appointment Reminder Message. The options will include any message descriptions that have been created on the MESSAGES screen for this application.

   b. [Optional] Click on the APPOINTMENT SHOW checkbox to enable an option for sending messages to students who showed up for their appointments. Then click on the adjacent field ▼ and select the description of the Appointment Show Message. The options will include any message descriptions that have been created on the MESSAGES screen for this application.

   c. [Optional] Click on the APPOINTMENT NO SHOW checkbox to enable an option for sending messages to students who did not show up for their appointments. Then click on the adjacent field ▼ and select the description of the Appointment No Show Message. The options will include any message descriptions that have been created on the MESSAGES screen for this application.

   d. [Optional] Click on the MANUAL BATCH checkbox to enable an option for selecting a default message that will be displayed automatically when creating batches using the Manual Method, the Select from SARS·GRID Method, or the Import from External File Method. Then click on the adjacent field ▼ and select the description of the default message. The options will include any message descriptions that have been created on the MESSAGES screen for this application.

   Note
   If no description is available from the Description field, it means that no message has been created for the selected application. Go back and create Message Descriptions (See Section 3.4.3).

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3.5 Select Schedule Codes

If SARS Messages will be sending daily appointment reminders by grabbing appointments from SARS Anywhere, the applicable Schedule Codes will need to be linked to each application. SARS Messages will search for appointments based on the schedule codes that are selected.

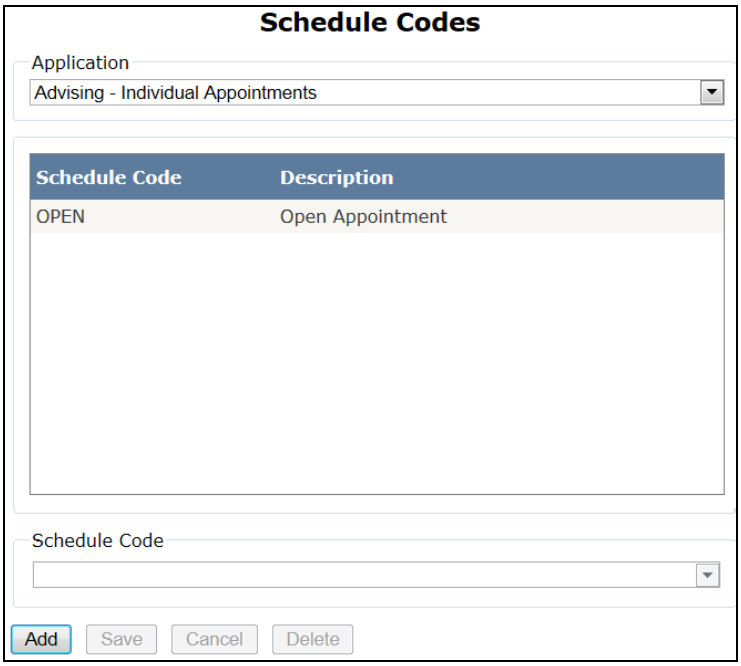
3.5.1 Select Schedule Codes for each Application

- REQUIRED ACCESS PERMISSIONS: ☑ SCHEDULE CODES – ACCESS
  ☑ SCHEDULE CODES – ADD

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on the SCHEDULE CODES option from the left-hand menu to display the Schedule Codes screen.

   Here is an example of some schedule code options for an application using individual appointments:



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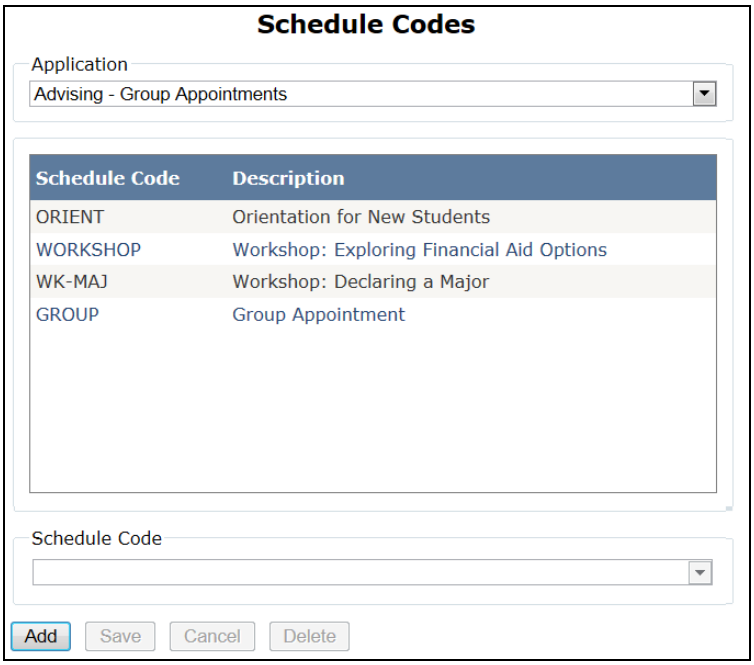
Here is an example of some schedule code options for an application using group appointments:



The options are:

- APPLICATION: Use to select the name of an application.
- SCHEDULE CODE / DESCRIPTION: Used to display Schedule codes that have been selected for the application.
- SCHEDULE CODE: Use to select an appointment-available Schedule Code for use with this application (e.g., Open, Orientation, 60-minute, etc.).
- ADD: Use to enable the Schedule Code field to associate a schedule code with the selected application.
- SAVE: Use to store a new Schedule Code and add it to the list.
- CANCEL: Use to cancel a selection of a new Schedule Code before it has been saved.
- DELETE: Use to delete an existing Schedule Code for the selected application. (The button is activated only if a Schedule Code name is highlighted.)

3. Click on APPLICATION ▼ and select the desired application. (If the desired application is not displayed as an option, return to Section 3.2.1 to create the application.)

4. Click on ADD. This will enable the Schedule Code field.

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5. Click on SCHEDULE CODE ▼ and select an appointment-available schedule code from the menu. If the application is for individual appointments, only those appointment-available codes associated with individual appointments will be displayed for selection. If the application is for group appointments, only those appointment-available codes associated with group appointments will be displayed for selection.

6. Click on SAVE. The Schedule Code will be placed on the Schedule Code/Description list.

7. Repeat steps 4 – 6 to add other Schedule Codes for the selected application.

8. Repeat steps 3 – 7 for other applications.

3.5.2 De-select a Schedule Code

◆ REQUIRED ACCESS PERMISSION: ☑ SCHEDULE CODES – ACCESS
☑ SCHEDULE CODES – DELETE

Deleting a Schedule Code for a selected application will have the effect of not allowing the system to search for appointments with that Schedule Code when creating messages batches.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on the SCHEDULE CODES option from the left-hand menu to display the Schedule Codes screen.

3. Click on APPLICATION ▼ and select the desired application.

4. Click on the line containing the name of the Schedule Code to be deleted. It will be highlighted.

5. Click on DELETE. A confirmation message will be displayed.

6. Click on OK.

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3.6 Establish Application Security

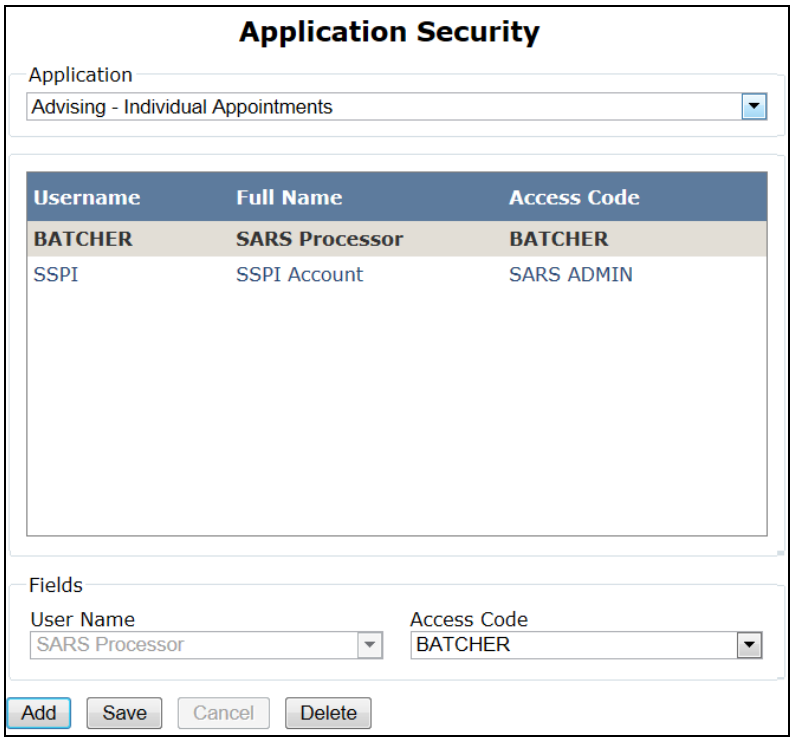
User accounts and Access Codes were created when the global security settings were established (See Part II). Now, each user name that will be using a specific application must be selected and an access code assigned to it. This is performed using the Security feature within SARS Messages.

3.6.1 Add User Names and Assign Access Codes

◆ REQUIRED ACCESS PERMISSION: ☑ ACCESS SARS·MESSAGES
☑ USER APPLICATION ASSIGNMENTS – MANAGE

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on the SECURITY option from the left-hand menu to display the Application Security screen. Here is an example:



The options are:

- APPLICATION: Use to select the desired application.
- USERNAME/FULL NAME/ACCESS CODE: Used to display a list of User names and their associated access codes for the selected Application.
- FIELDS:

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USER NAME:	Use to select a User Name that will be authorized to work with the selected application.
ACCESS CODE:	Use to select the Access Code for the selected User Name.
• ADD:	Use to enable the Application Security fields to create a new application.
• SAVE:	Use to store a new User Name and associated Access Code and add it to the list.
• CANCEL:	Use to cancel an entry before it has been saved.
• DELETE:	Use to delete an existing User name/Access Code for the selected application. (The button is activated only if a User Name is highlighted.)

3. Click on APPLICATION ▼ and select the desired application. (If the desired application is not displayed as an option, return to Section 3.3.1 to create the application.)

4. Click on ADD. This will enable the User Name and Access Code fields.

5. Click on USER NAME ▼ and select a User Name that will be permitted to work with the selected application. (If the desired User Name is not displayed as an option, return to Section 2.4.1 in Part II to create the User Name.)

6. Click on ACCESS CODE ▼ and select the Access Code to be assigned to this User Name. (If the desired Access Code is not displayed on the menu, return to Section 2.5.1 to create it.)

7. Click on SAVE. The User Name and assigned Access Code will be placed on the list.

8. Repeat steps 4 – 7 to add other User Names and assign them access codes for the selected application.

9. Repeat steps 3 – 8 <u>for each and every application</u>.

3.6.2 Delete User Names and Access Codes

◆ REQUIRED ACCESS PERMISSION: ☑ ACCESS SARS·MESSAGES
☑ USER APPLICATION ASSIGNMENTS – MANAGE

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on the SECURITY option from the left-hand menu to display the Application Security screen.

3. Click on APPLICATION ▼ and select the desired application.

4. Click on the line containing the name of the User Name to be deleted. The Delete button will be activated.

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5. Click on DELETE. A confirmation message will be displayed. :

6. Click on OK.

3.7 Start the Services

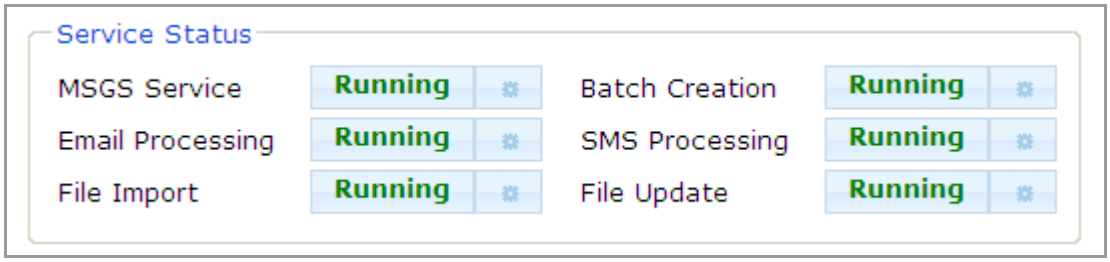
Six services need to be started before SARS Messages is completely operational. These services are:

MSGS Service
Email Processing
File Import
Batch Creation
SMS Processing
File Update

Initially, IT staff will start the required services from the server. The end users may view or change the status of each of the relevant services from the Global Settings screen by following the steps below:

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on GLOBAL SETTINGS from the left-hand menu to display the GLOBAL SETTINGS screen. Here is an example of the Service Status panel:



3. If all services are running, the text box for each service will display the word "Running."

4. To change the status of a service, click on the asterisk adjacent to the desired service. An options menu will be displayed.

5. Click on the desired option. START, STOP, PAUSE, RESUME, and RESTART will be available for selection, depending on the current status.

6. Click on SAVE.

7. Repeat steps 4 – 6 for each service for which the status is to be changed.

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PART IV — MESSAGE BATCHES

4.0 Overview

- REQUIRED ACCESS PERMISSIONS:
  - ☑ BATCHES - ACCESS
  - ☑ BATCHES - CREATE
- OPTIONAL ACCESS PERMISSIONS:
  - ☑ BATCHES – DELETE
  - ☑ BATCHES – MODIFY

The term Message Batches refers to the lists of students, generated automatically or manually, to be contacted by email and/or text phone, depending on the license purchased by the college. SARS Messages will send an email and/or text message to all the students in a message batch to convey the same type of message.

SARS Messages offers four methods of creating message batches. The first, which is discussed in Section 4.1, is highly recommended for sending routine, recurring message batches, such as daily appointment reminders. It is available only if SARS Messages is using a SARS database. The three custom processes methods, useful for creating and sending broadcast and other non-routine messages or for routine messages from systems that are not integrated with SARS Anywhere, are discussed in Section 4.2, 4.3 and 4.5. Section 4.6 discusses a quick setup method for creating batches on the fly.

This section is organized as follows:

4.1 Automated Processing of Routine Messages

4.2 Review the Status of Message Batches
- 4.2.1 View a Message Batch
- 4.2.2 Pause a Message Batch
- 4.2.3 Extend a Message Batch
- 4.2.4 Delete a Message Batch
- 4.2.5 Delete an Individual Entry from a Message Batch

4.3 Manual Entry

4.4 Selection from SARS·GRID

4.5 Input from External File
- 4.5.1 Set up an Import Format
  - 4.5.1.1 Create an Import File
  - 4.5.1.2 Specify the Record Layout
- 4.5.2 Schedule the Import
- 4.5.3 Run the Import Manually
- 4.5.4 Make Deletions
  - 4.5.4.1 Delete an Import File
  - 4.5.4.2 Delete an Import Selection
  - 4.5.4.3 Delete a Data Element from the Import Specifications Screen

4.6 Batch Import Quick Setup

4.7 Recommended Routines

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4.1 Automated Processing of Routine Messages

If the Appointment Reminder message, the Appointment Show message, and the Appointment No Show message options have been created for your application on the Application Settings screen, and the application is integrated with SARS Anywhere, those messages will be processed automatically by the SARSMSGS SERVICE. This service is the executable program that automatically looks for records (for example, students' email and/or text phone numbers and appointment information) and gathers them into a batch for routine, recurring messages. It is configured to start up automatically whenever the PC is booted. It resides in Windows Services. This is how it works:

1. The SARSMSGS SERVICE should be set as "Started." (See Section 3.7.)

2. When activated or started, this program looks for batches that are checked as ENABLED on the BATCHES screen for the selected Application.

3. When the clock on the server on which SARSMSGSSERVICE is running reaches the time specified as the APPOINTMENT LOOKUP TIME for a selected Application, the program:

   a. Looks for all eligible appointment records using the SARS database.

   b. Creates a batch of those records and names the batch with the name of the message and date, as well as the date and time when it was run. Example: ***Appointment Reminders for - 4/24/2014 4/23/14 2:00 PM***

   c. Inserts the batch on the BATCHES screen that are enabled, as indicated by the ▶ (Play/Enabled) icon immediately to the left of the batch description.

4. Messages will be sent via email and/or text, based on the Contact Methods allowed for each student as recorded in Student Maintenance in SARS Anywhere (if using a SARS· database) or on the Manual Entry screen.

5. [For email messages] If the GROUP SIZE on the SMTP CONFIGURATION settings screen is greater than 0, the SARSMSGSSERVICE will stop sending messages once the maximum group size has been reached, and will re-start sending the remaining messages after the number of minutes established in the DELAY BETWEEN GROUPS have elapsed.

6. On the BATCH DETAILS screen, available by clicking on PROPERTIES from the BATCHES screen for the selected Application, the COMPLETED column will display **True** (if the message was sent) or **False** (if it was not).

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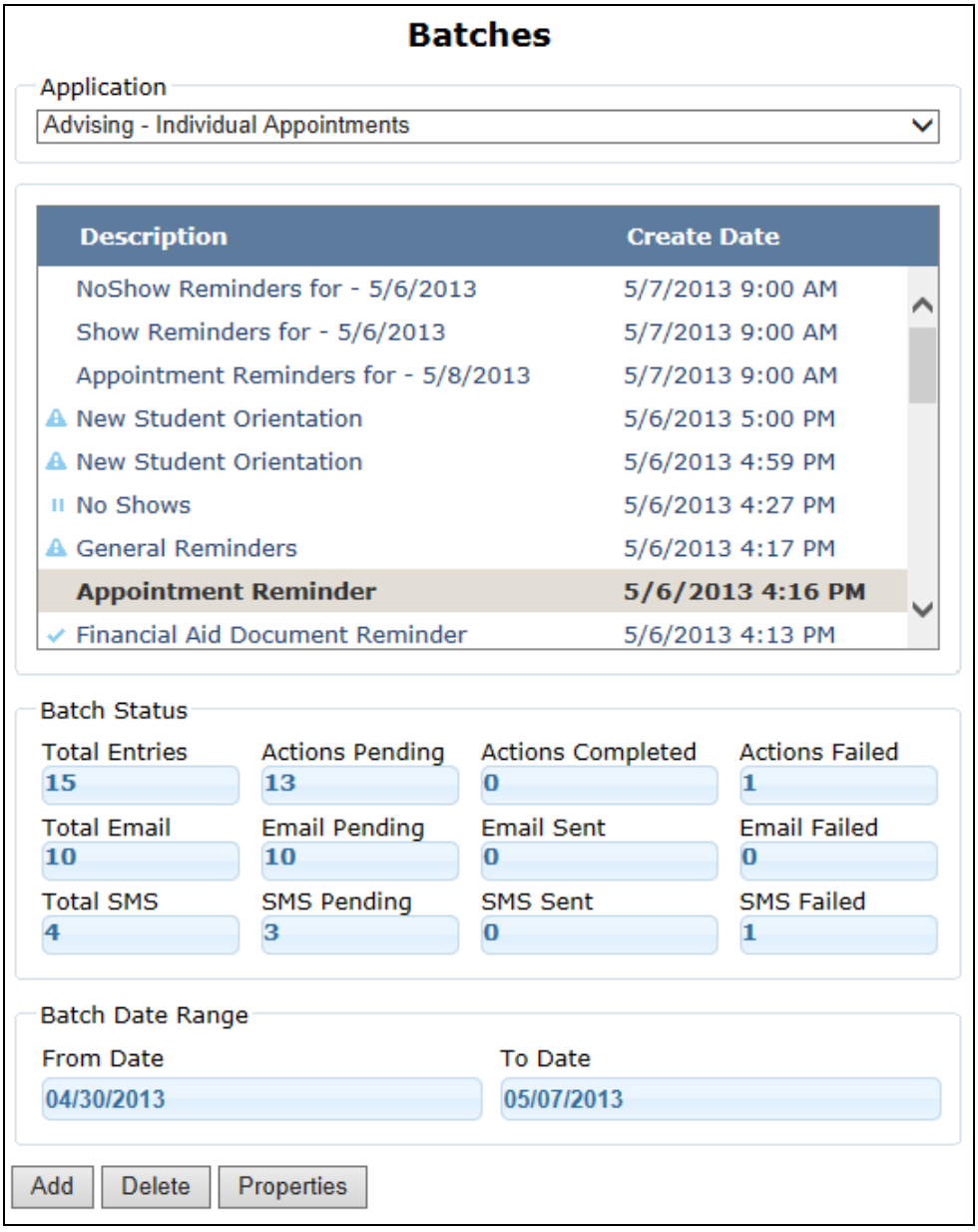
4.2 Review the Status of Message Batches

The BATCHES screen may be used to create message batches using the ADD feature and to review the status of message batches that have been sent or are pending. It may also be used to extend an unfinished batch, and to delete batches.

4.2.1 View a Message Batch

1. From your web browser, log in to the SARS Messages web application URL.

2. Click on BATCHES from the left-hand menu to display the BATCHES screen. Here is an example:



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The options are:

- APPLICATION: Use to select the application for which batches are to be viewed.
- DESCRIPTION/CREATE DATE: Used to display all batches created for the application that have not yet been deleted and the date and time that each batch was created.
- BATCH STATUS: Use to view the status of a selected batch.

  TOTAL ENTRIES: Used to display the total number of records in the batch.

  ACTIONS PENDING: Used to display the number of records that have not yet been sent.

  ACTIONS COMPLETED: Used to display the number of records that have been sent.

  ACTIONS FAILED: Used to display the number of records that were not successfully sent.

  TOTAL EMAIL: Used to display the total number of email records in the batch.

  EMAIL PENDING: Used to display the number of email records that have not yet been sent.

  EMAIL SENT: Used to display the number of email records that have been sent.

  EMAIL FAILED: Used to display the number of email records that were not successfully sent.

  TOTAL SMS: Used to display the total number of text records in the batch.

  SMS PENDING: Used to display the number of text records that have not yet been sent.

  SMS SENT: Used to display the number of text records that have been sent.

  SMS FAILED: Used to display the number of text records that were not successfully sent.

- BATCH DATE RANGE:

  FROM DATE: Use to select the earliest date for which batches should be retrieved. This date defaults to the start of the prior week.

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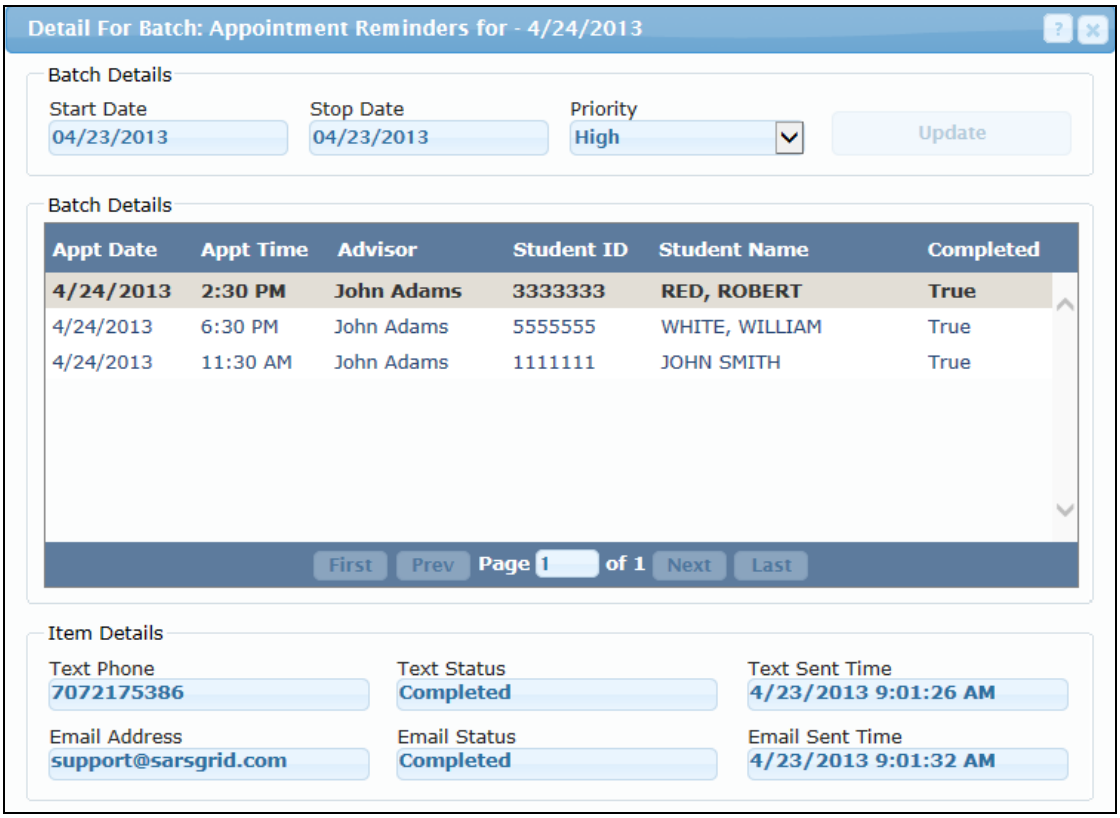
TO DATE:	Use to select the latest date for which batches should be retrieved. This date defaults to the end of the prior week.
• ADD:	Use to add a new batch for processing.
• DELETE:	Use to delete a batch that has been highlighted.
• PROPERTIES:	Use to open a batch properties screen to view individual records for the selected batch.

3. In the Application panel, click on ▼ and select the desired application (e.g., Advising).

4. Click on the description of the batch to be reviewed. This will populate the fields in the Batch Status panel.

5. To view details about one or more records in the batch, click on PROPERTIES to display a BATCH DETAILS screen. Here is an example:



The options are:

• START DATE:	Use to view the start date of a selected batch, or use to enter a new start date to extend a batch.
• STOP DATE:	Use to view the stop date of a selected batch, or use to enter a new stop date to extend a batch.

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- PRIORITY: Use to view the priority level of the message batch, or use to change the priority level for a selected batch that is to be extended.
- UPDATE: Use to extend a selected batch.
- BATCH DETAILS: Used to display a list of each student in the batch.
  - APPT DATE: [if applicable] Used to display the date of the appointment for which the message pertained.
  - APPT TIME: [if applicable] Used to display the time of the appointment for which the message pertained.
  - ADVISOR: [if applicable] Used to display the name of the advisor for which the message pertained.
  - STUDENT ID: Used to display the Student ID number of the student to whom a message in the batch was sent.
  - STUDENT NAME: Used to display the name of the student to whom a message in the batch was sent.
  - COMPLETED: Used to display whether the message to the selected student was successfully sent (TRUE) or not (FALSE).
- ITEM DETAILS: Used to display the status of the message(s) for a selected student.
  - TEXT PHONE: Used to display the text phone number of the student, if a text message was sent.
  - TEXT STATUS: Used to display the status of the text message, if a text message was sent.
  - TEXT SENT TIME: Used to display the time that the text message was sent, if applicable.
  - EMAIL ADDRESS: Used to display the email address of the student, if an email message was sent.
  - EMAIL STATUS: Used to display the status of the email message, if an email message was sent.
  - EMAIL SENT TIME: Used to display the date and time on which the email message was sent to the selected student, if applicable.
- DELETE: Use to delete a selected student from the batch.
- CLOSE: Use to exit the Batch Details screen.

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6. Review the COMPLETED column in the Batch Details panel to find any students for whom a **False** entry exists. This indicates that the message was not sent to the student.

7. Click on the line containing that student's record. The details of that message will be displayed in the Item Details panel below.

   a. The three fields on the top line will contain information if a text message was sent. The TEXT STATUS field may contain any of the following messages:

COMPLETED:	The text message was successfully sent to the student's text phone.
PENDING:	The text message is still pending in the batch.
NO TEXT PHONE:	The student does not have a text phone listed in the system.
INVALID TEXT PHONE:	The text phone listed for the student is not valid.
SMS ERROR:	The SMS server encountered an error and did not send the message.
SMS OPT OUT:	The student opted out of receiving text messages.

   b. The three fields on the bottom line will contain information if an email message was sent. The EMAIL STATUS field may contain any of the following messages.

COMPLETED:	The email message was successfully sent to the student's email address.
PENDING:	The email message is still pending in the batch.
NO EMAIL ADDRESS:	The student does not have an email address listed in the system.
INVALID EMAIL ADDRESS:	The email address listed for the student is not valid.
SMTP ERROR:	The SMTP server encountered an error and did not send the message.
APPOINTMENT CANCELLED:	The student responded to the email message by canceling the appointment.
EMAIL OPT OUT:	The student opted out of receiving email messages.

8. To delete a record from the BATCH DETAILS screen,

   a. Click on the line containing the record.

   b. Click on DELETE. A confirmation message will be displayed.

   c. Click on OK. The record will be deleted.

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9. To exit the screen, click on CLOSE.

4.2.2 Pause a Message Batch

1, From your web browser, log in to the SARS Messages web application URL.

2. Click on BATCHES from the left-hand menu to display the BATCHES screen.

3. Note the symbol preceding the name of the message batch. It will either be in Play (Enable) mode, which looks like this: ▶ ,

   -or-

   It will be in Pause mode, which looks like this: **II** .

4. Click on the ▶ symbol. It will change to Pause mode, and the batch will not process until it is again enabled.

4.2.3 Extend a Message Batch

If a message batch has ended without completing all of the records in the grouping, it may be extended so that the rest of the records can be completed. The extend action allows for changing the start and stop dates only; the stop time will remain the same.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on BATCHES from the left-hand menu to display the BATCHES screen.

3. In the Application panel, click on ▼ and select the desired application

4. To find a batch that is not displayed on the screen, in the Batch Date Range panel,

   a. Click on the FROM DATE field and select the earliest date in which the message batch may be found.

   b. Click on the TO DATE field and select the latest date in which the message batch may be found. The Description/Create Date box will be populated with any batches created for that date range.

5. Click on the description of the batch to be extended.

6. Click on PROPERTIES to display the batch details screen.

7. Click on START DATE and select a new start date for running the selected message batch.

8. Click on STOP DATE and select a new start date for running the selected message batch.

9. [optional] Click on PRIORITY ▼ and select the priority level for running the extended batch.

10. Click on UPDATE. A confirmation message will be displayed.

11. Click on OK. The batch will be re-run based on the selected criteria.

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12. Click on CLOSE to exit the batch details screen.

4.2.4 Delete a Message Batch

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on BATCHES from the left-hand menu to display the BATCHES screen.

3. In the Application panel, click on ▼ and select the desired application from the menu (e.g., Advising). All applications to which the user has been granted access will be displayed.

4. To find a batch that is not displayed on the screen, in the Batch Date Range panel,

   a. Click on the FROM DATE field and select or type in the first date of the batches to be viewed.

   b. Then click on the TO DATE field and select or type in the last date of the batches to be viewed. This will populate the display panel with all message batches between the From Date and To Date.

5. Click on the line displaying the batch to be deleted.

6. Click on DELETE. A confirmation message will be displayed.

7. Click on OK.

8. Click on CLOSE.

4.2.5 Delete an Individual Record in a Batch

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on BATCHES from the left-hand menu to display the BATCHES screen.

3. In the Application panel, click on ▼ and select the desired application from the menu (e.g., Advising). All applications to which the user has been granted access will be displayed.

4. To find a batch that is not displayed on the screen, in the Batch Date Range panel,

   a. Click on the FROM DATE field and select or type in the first date of the batches to be viewed.

   b. Then click on the TO DATE field and select or type in the last date of the batches to be viewed. This will populate the display panel with all message batches between the From Date and To Date.

5. Click on the line displaying the batch containing the record to be deleted.

6. Click on PROPERTIES to display the Batch Details screen.

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7. Click on the record to be deleted.

8. Click on DELETE. A confirmation message will be displayed.

9. Click on OK.

10. Click on CLOSE.

4.3 Manual Entry Method

The Manual Entry method is useful for creating a batch of just a few students based on data that is not contained in the SARS database, or for creating a message batch on short notice. For example:

- Create a batch of only those students who have afternoon appointments today with an advisor who called in sick. SARS Messages can send that message in the morning to cancel the afternoon appointments.

- Create a batch of a small group of students who will be seeing a tutor or an advisor and who need to be reminded to bring certain documents with them.

The Manual Entry screen is accessed by using the ADD button from the BATCHES screen.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on BATCHES from the left-hand menu to display the BATCHES screen.

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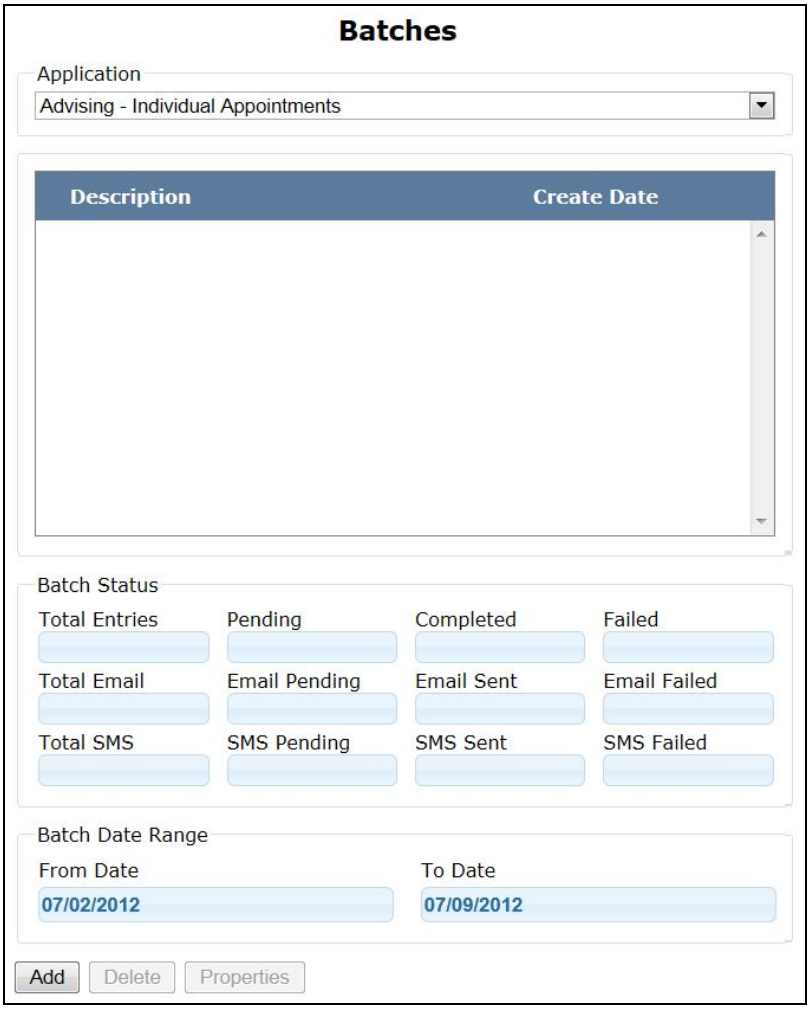
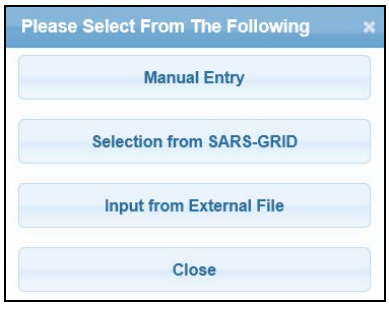
Here is an example:



3. In the Application panel, click on ▼ and select the desired application from the menu (e.g., Advising). The name will be highlighted and a list of any batches that have been created for that application will be displayed.

4. Click on ADD to display the following batch selection screen:



5. Click on MANUAL ENTRY to display the Manual Entry screen.

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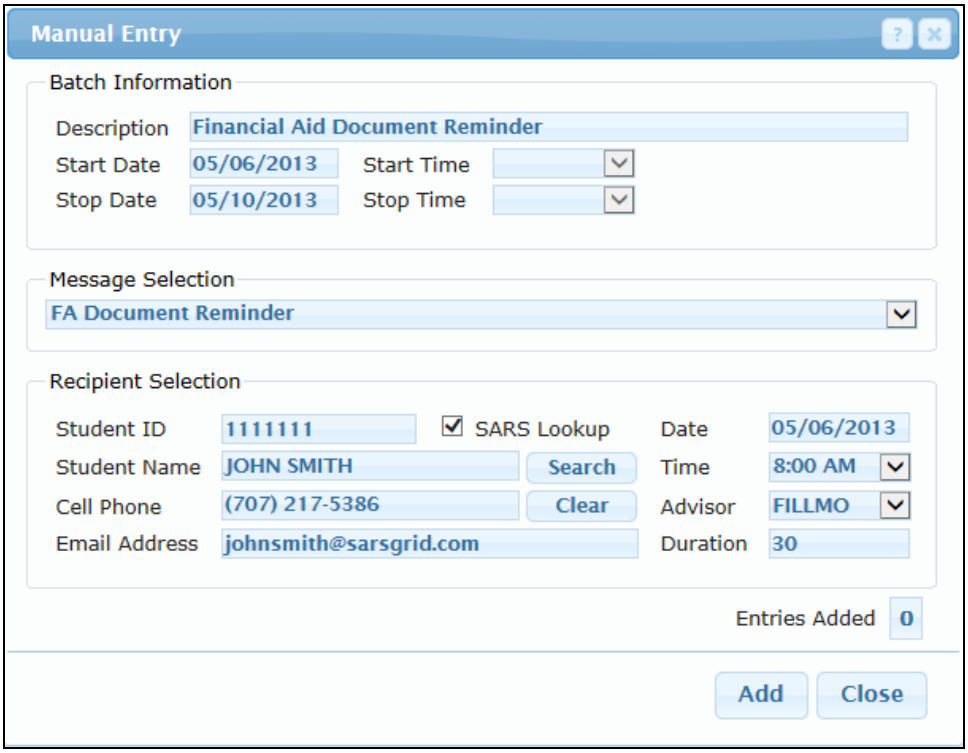
Here is an example:



The options are:

- BATCH INFORMATION:

DESCRIPTION:	Use to enter a brief description of the grouping. An entry in this field is required.
START DATE:	Use to select the first date on which to send messages to this group. An entry in this field is required.
STOP DATE:	Use to select the last date on which to send messages to this group. (This date will typically be the same as the START DATE.) An entry in this field is required.
START TIME:	Use to select the time at which the system will begin sending the selected message to this batch. This option will be disabled when the global settings for the selected application are set to run continuously.
STOP TIME:	Use to select the time at which the system will stop sending the selected message to this batch. This option will be disabled when the global settings for the selected application are set to run continuously.

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- MESSAGE SELECTION: Use to select the message to be used for this batch.

- RECIPIENT SELECTION:

  STUDENT ID: [Optional] Use to enter the student identification number of the student to be added to the grouping.

  SARS LOOKUP: Use to automatically retrieve and display student information (name, text phone number, and email address) that is stored in the SARS database after entering a student's ID. This option is available only for applications that are integrated with SARS.

  STUDENT NAME: Use to manually enter the name of the student to be added to this grouping.

    SEARCH: Use, if SARS Lookup is checked, to search for a student's ID by name.

    CLEAR: Use to clear the fields for another entry.

  CELL PHONE: Use to manually enter the text phone number of the student whose record is to be added to this grouping. This field will be disabled if the selected message for the batch does not have an associated SMS template or if the application is for EMAIL ONLY.

  EMAIL ADDRESS: Use to enter the email address of the student whose record is to be added to this batch. This field will be disabled if the selected message for the batch does not have an associated email template or if the application is for SMS ONLY.

  DATE: Use to enter the date of the appointment for the student whose name is displayed. An entry in this field is required if the Appointment Date option is to be used.

  TIME: Use to enter the time of the appointment for the student whose name is displayed. An entry in this field is required if the Appointment Time option is to be used.

  ADVISOR: Use, if applicable, to select the name of the advisor whose name will be included in the message to this group.

  DURATION: Use, if applicable, to enter the length of the appointment.

- ENTRIES ADDED: Used to display the number of student records that are included in this message batch.

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- ADD: Use to save the entry of the student's appointment information and include it with other student information in this message batch.
- CLOSE: Use to exit the MANUAL ENTRY screen.

6. In the Batch Information panel,

   a. Click on the DESCRIPTION field and enter a brief description of the batch that is being created. This description will be displayed on the BATCHES list and should be distinguishable from other batches.

   b. Click on START DATE and select from the calendar the first date to start sending messages.

   c. Click on STOP DATE and select from the calendar the last date to send messages for this batch. (Typically, this will be the same as the Start Date.)

   d. [Only if not running continuously] Click on START TIME ▼ and select the time to commence sending the messages.

   e. [Only if not running continuously] Click on STOP TIME ▼ and select the time that the system should stop sending messages, even if the batch has not yet finished.

7. Click on MESSAGE SELECTION ▼ and select the message that will be sent for this batch. If the desired message is not on the list, create a new message description using Messages option and then create an email and/or SMS template (see Section 3.4). An example of such a message might be:

   Dear |StudentFirstName|,
   You have an appointment scheduled this afternoon with |AdvisorName|
   at |AppointmentTime|. Your advisor is unable to make this appointment.
   Please contact the advising center to reschedule.

8. In the Recipient Selection panel,

   a. If the student information is to be selected from SARS Anywhere, click on the SARS LOOKUP checkbox. If this option is selected, only the student's ID number or last name needs to be entered in the relevant fields; then click on SEARCH. If only one student with that ID or name is located, SARS Messages will populate the fields for the student's ID, name, phone number, and e-mail address. If more than one student matches the name, a Search Results screen will be displayed showing a list of students matching the name.

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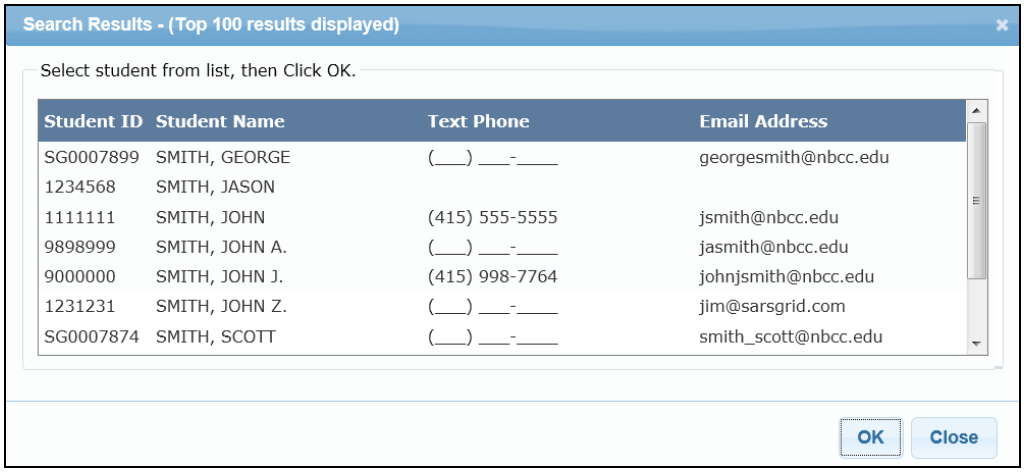
Here is an example:



i) Click on the desired name.

ii) Click on OK.

b. If student information is to be entered manually, do not click on the SARS LOOKUP checkbox. Then,

i) Click on ID and enter the student's ID number.

ii) Click on STUDENT'S NAME and enter the name of the student.

iii) Click on CELL PHONE and enter the student's text phone number. The field will be disabled if the application is set for EMAIL ONLY.

iv) Click on EMAIL ADDRESS and enter the student's email address. The field will be disabled if the application is set for SMS ONLY.

v) Click on DATE and select the date of the appointment using the date picker calendar if the message pertains to an appointment.

vi) Click on TIME ▼ and select the time of the appointment, if the message pertains to an appointment.

vii) Click on ADVISOR ▼ and select the name of the advisor with whom the appointment is scheduled, if the message pertains to an appointment.

viii) Click on DURATION ▼ and select the duration of the appointment, if the message pertains to an appointment.

c. Click on ADD to save the entry.

9. Click on CLEAR and repeat step # 8 until all the students for this message batch have been entered. The ENTRIES ADDED box will show a cumulative tally as each new entry is added.

10. When done entering all student records to be used for the message batch that you are creating, click on CLOSE.

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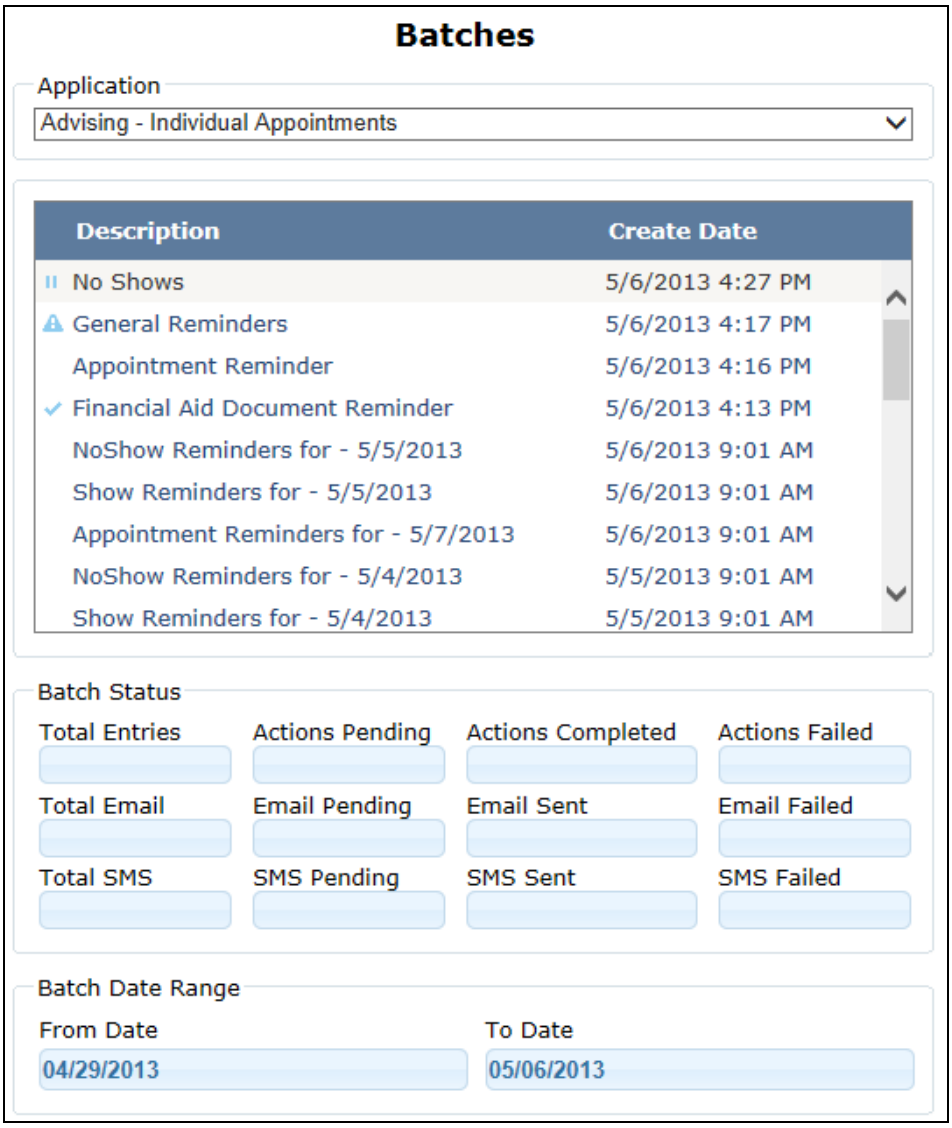
4.4 Select from SARS·GRID Method

This method is effective when you want to create customized message batches using information contained in the SARS databases, but using your own selection criteria. For example, the system may be linked to SARS Anywhere and set up to send "no show" messages automatically to students who did not attend their prior-day appointments. However, if you want to send messages to students who were “no shows” for appointments beyond "yesterday," SARS Messages can be directed to find those no show records and create a batch using this method. This method may also be used to send a message to all students who had appointments in a particular department during the last term.

1. Using your web browser, log in to the SARS Messages application via the college’s public website (to be provided by college).

2. Click on BATCHES from the left-hand menu to display the BATCHES screen. Here is an example:



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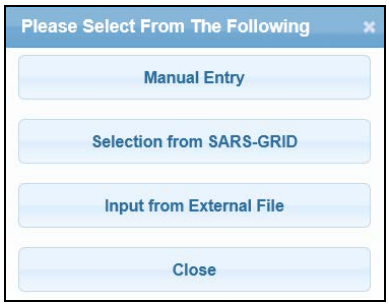
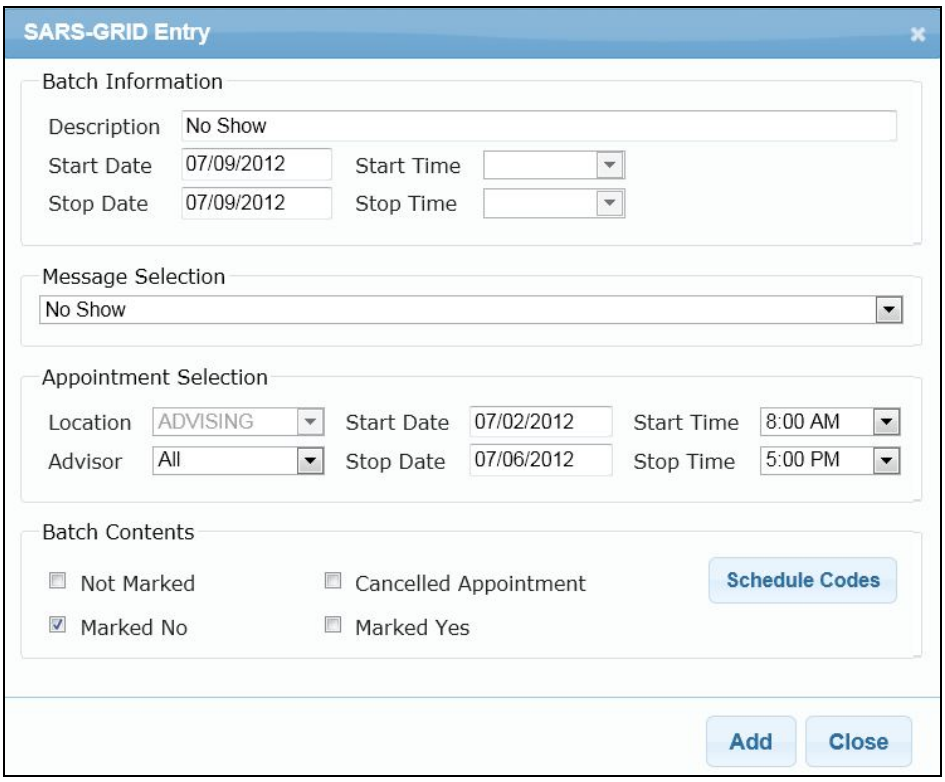
3. In the Application panel, click on ▼ and select the desired application from the menu (e.g., Advising). The name will be highlighted and a list of any batches that have been created for that application will be displayed.

4. Click on ADD to display the following batch selection screen.



5. Click on SELECTION FROM SARS·GRID to display the SARS·GRID Entry screen. Here is an example:



The options are:

- BATCH INFORMATION:

DESCRIPTION:	Use to enter a brief description of the grouping you will be creating.
START DATE:	Use to select the day on which to start sending messages to this grouping.

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STOP DATE: Use to select the day on which to stop sending the selected message to this grouping.

START TIME: Use to select the time at which the system will begin to send the selected message to this group. This option will be disabled if SARS Messages is running continuously (see Global Settings in Section 3.2.1).

STOP TIME: Use to select the time at which the system will stop sending the selected message to this grouping. This option will be disabled if SARS Messages is running continuously (see Global Settings in Section 3.2.1).

- MESSAGE SELECTION: Use to select the message for this batch.
- APPOINTMENT SELECTION:

LOCATION: Used to display the Location Code for which the grouping will be created. This field is derived from the Location Code selected on the Application Settings screen and is locked and unchangeable on this screen..

ADVISOR: Use to select the name of the advisor with whom the appointments in this batch are scheduled, or select ALL to send messages for appointments with all advisors.

START DATE: Use to select the first appointment date scheduled in SARS Anywhere for extraction into the message batch.

STOP DATE: Use to select the last appointment date scheduled in SARS Anywhere for extraction into the message batch.

START TIME: Use to select the earliest time that an appointment is scheduled in SARS Anywhere for extraction into the message batch.

STOP TIME: Use to select the latest time that an appointment is scheduled in SARS Anywhere for extraction into the message batch.

- BATCH CONTENTS:

NOT MARKED: Use to extract data from the SARS Database for all students who had appointments during a specified date range for which their attendance was not marked.

MARKED NO: Use to extract data from the SARS Database for those students whose attendance status for

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appointments during a specified date range is marked as not attended.

CANCELLED APPOINTMENT: Use to extract data from the SARS Database for those students who cancelled their appointments.

MARKED YES: Use to extract data from SARS Database for those students whose attendance status for appointments during a specified date range is marked as attended.

- SCHEDULE CODES: Use to select desired Schedule Codes to be included in the batch.
- ADD: Use to save the information on the SARS·GRID Entry screen and include it with other student information in this grouping.
- CLOSE: Use to exit the SARS·GRID Entry screen.

6. In the Batch Information panel,

   a. Click on the DESCRIPTION field, and type in a description of the batch.

   b. Click on START DATE and type in the date on which messages should start being sent for this batch, or select the date from the calendar.

   c. Click on STOP DATE and type in the date on which messages should stop being sent for this batch, or select the date from the calendar.

   d. Click on START TIME and type in the time when the messages should start being sent for this batch, or click on ▼ and select the time from the list.

   e. Click on STOP TIME and type in the time when messages should stop being sent for this batch, or click on ▼ and select the time from the list.

7. Click on MESSAGE SELECTION ▼ and select the message for this batch.

8. In the Appointment Selection panel,

   a. Click on LOCATION ▼ and select the Location for which the batch is to be created.

   b. Click on ADVISOR ▼ and select the Advisor Name for whom the batch is to be created, or select ALL if messages are to include all advisor names.

   c Click on START DATE and select the earliest appointment date scheduled in SARS Anywhere for extraction into the message batch, or select the date from the calendar.

   d. Click on STOP DATE and select the last appointment date scheduled in SARS Anywhere for extraction into the message batch, or select the date from the calendar.

   e. Click on START TIME ▼ and select the earliest time that an appointment is scheduled in SARS Anywhere for extraction into the message batch.

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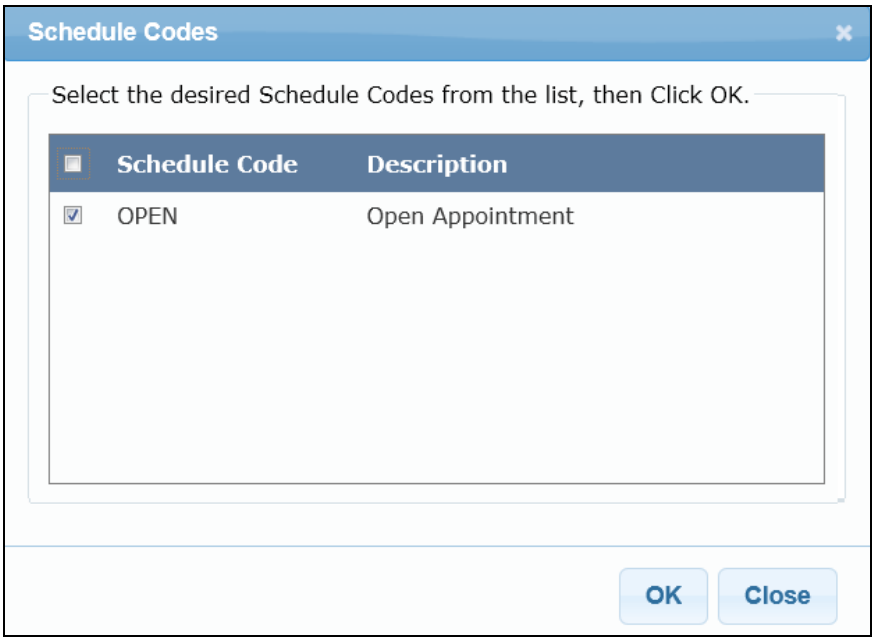
f. Click on STOP TIME ▼ and select the latest time that an appointment is scheduled in SARS Anywhere for extraction into the message batch.

9. In the Batch Contents panel, click on one of the four types of attendance status boxes, as desired, to be included in the file.

10. Click on SCHEDULE CODES to display a Schedule Code selection screen. Here is an example:

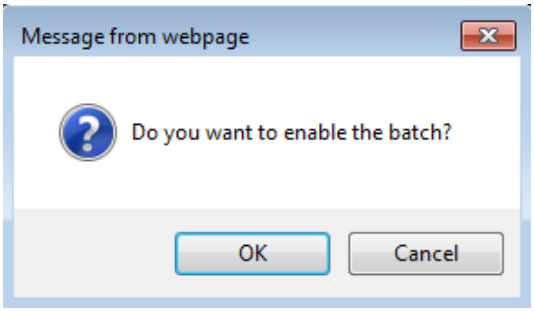


a. Click on the checkbox adjacent to the Schedule Code(s) to be included in the batch.

Note The Schedule Code screen will display only those Schedule Codes for the selected application and appointment type (e.g., Individual or Group) that have been designated as appointment-allowable. Separate batches must be created for Individual appointments and for Group appointments, as the applicable appointment-Allowable Schedule Codes may differ.

b. Click on OK.

11. Click on ADD to save the selection(s). The following message will be displayed:



12. Click on OK to add the batch and enable it for processing, or click on CANCEL to simply add the batch without enabling it. The batch can be enabled at a later time.

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4.5 Input from External File Method

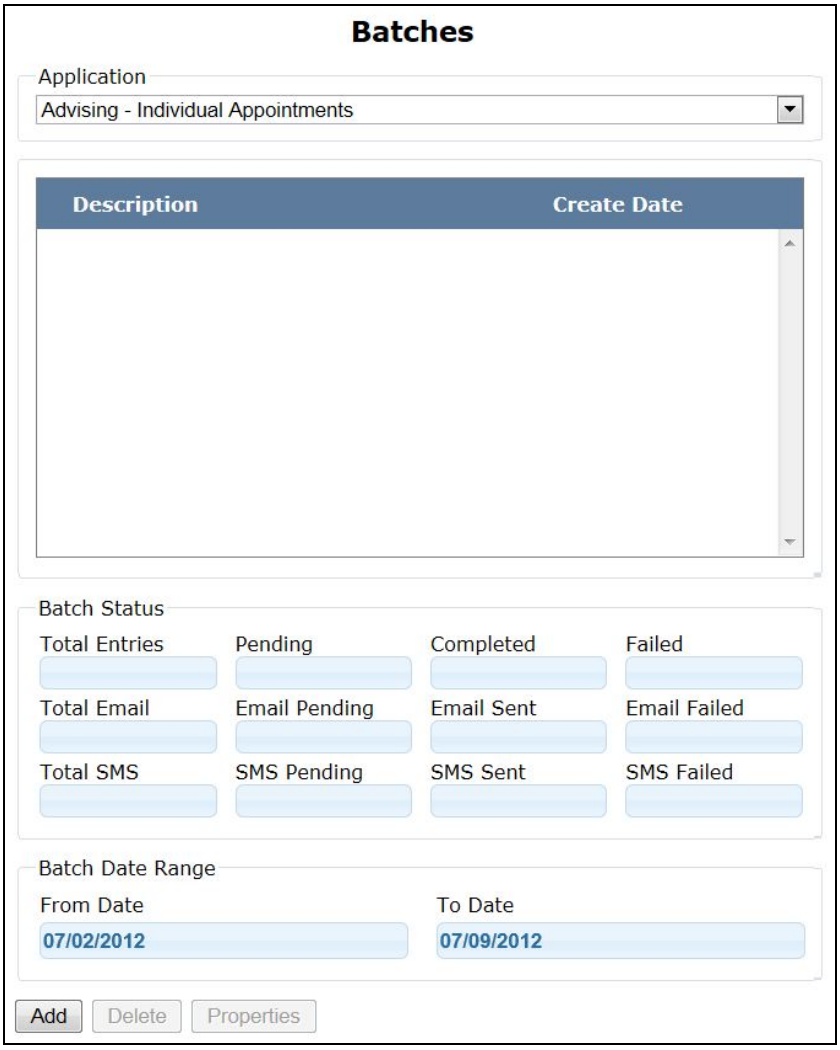
The Input from External File Method may be used to import student data into SARS Messages. The import is accomplished using a file of student data generated from the college's databases. The application is used to specify the order in which data elements will be imported and to initiate or schedule the import process. This method is often used to send messages that are unrelated to appointments in SARS Anywhere. They may be fee reminders, parking permit notices, registration reminders, or other types of messages.

4.5.1 Set up an Import Format

4.5.1.1 Create an Import File

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

2. Click on BATCHES from the left-hand menu to display the BATCHES screen. Here is an example:



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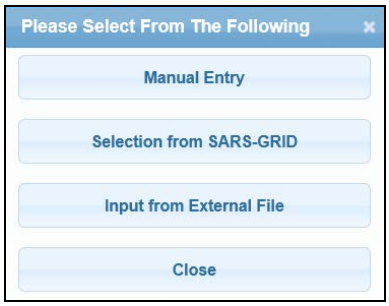
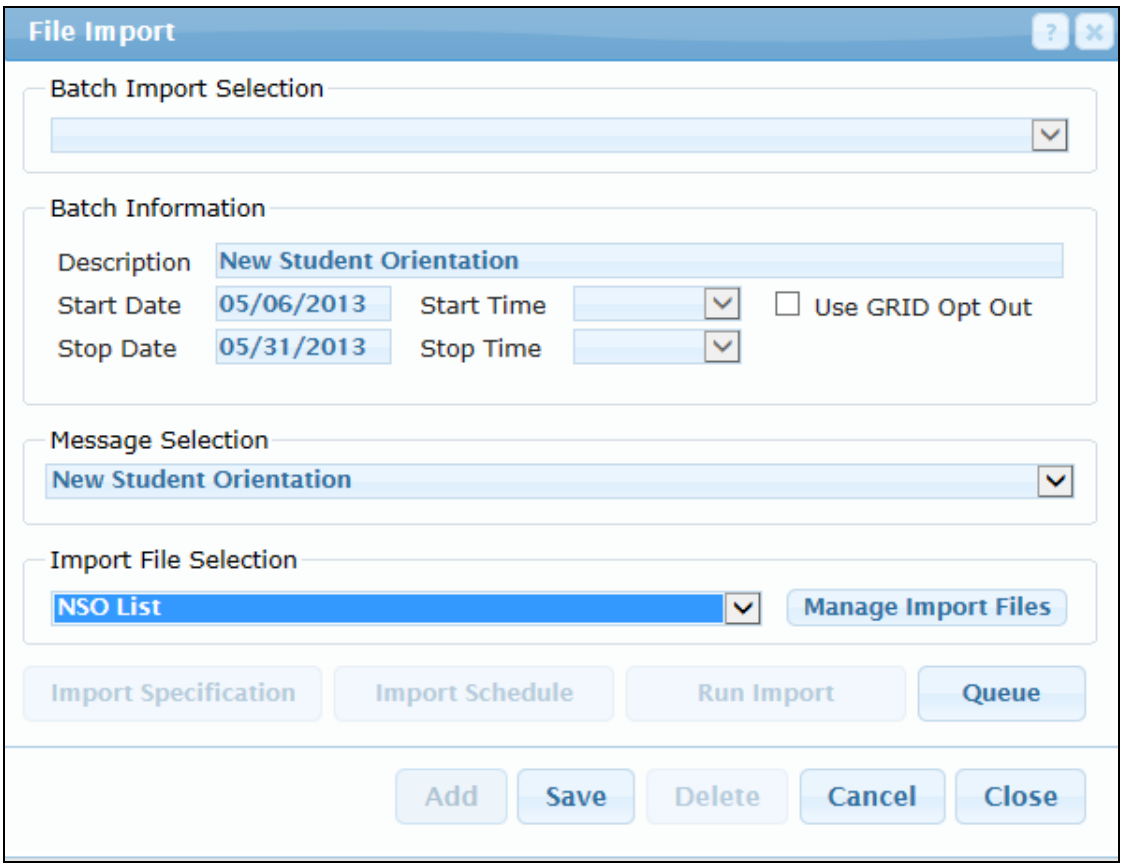
3. Click on APPLICATION ▼ and select the application for which the import format is to be created (e.g., Early Registration Announcement).

4. Click on ADD to display the following batch selection screen.



5. Click on INPUT FROM EXTERNAL FILE to display a FILE IMPORT screen. Here is an example:



The options are:

- BATCH IMPORT SELECTION: Use to select the batch file to be run.
- BATCH INFORMATION:

  DESCRIPTION: Use to add a new description for the batch.

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START DATE:	Use to select the earliest date for running the batch.
STOP DATE:	Use to select the latest date to run the batch.
START TIME:	Use to select the time at which the batch should start running. This option will be disabled if SARS Messages for this application is running continuously (see Global Settings in Section 3.2.1).
STOP TIME:	Use to select the time at which the batch should stop running. This option will be disabled if SARS Messages for this application is running continuously (see Global Settings in Section 3.2.1).
USE GRID OPT OUT:	Use to allow students to opt out of receiving this message.
• MESSAGE SELECTION:	Use to select the message to be sent to this batch.
• IMPORT FILE SELECTION:	Use to select an import file from a list of previously-created files.
• MANAGE IMPORT FILES:	Use to add, edit, update or delete an import file.
• IMPORT SPECIFICATION:	Use to specify the record layout for data elements that are imported. (See Section 4.5.1.2, below)
• IMPORT SCHEDULE:	Use to schedule the import process. (See Section 4.5.1.3, below.)
• RUN IMPORT:	Use to manually initiate the import process for the selected file. (See Section 4.5.1.4, below.)
• QUEUE:	Use to view a list of import files, including the status, the name of the user who submitted the file, and the date and time the file was submitted. Also use to stop a selected import file.
• ADD:	Use to add import format descriptions to the list.
• SAVE:	Use to store a new import format description.
• DELETE:	Use to delete an import format description.
• CANCEL:	Use to undo an action or entry that has not yet been saved.
• CLOSE:	Use to exit the screen.

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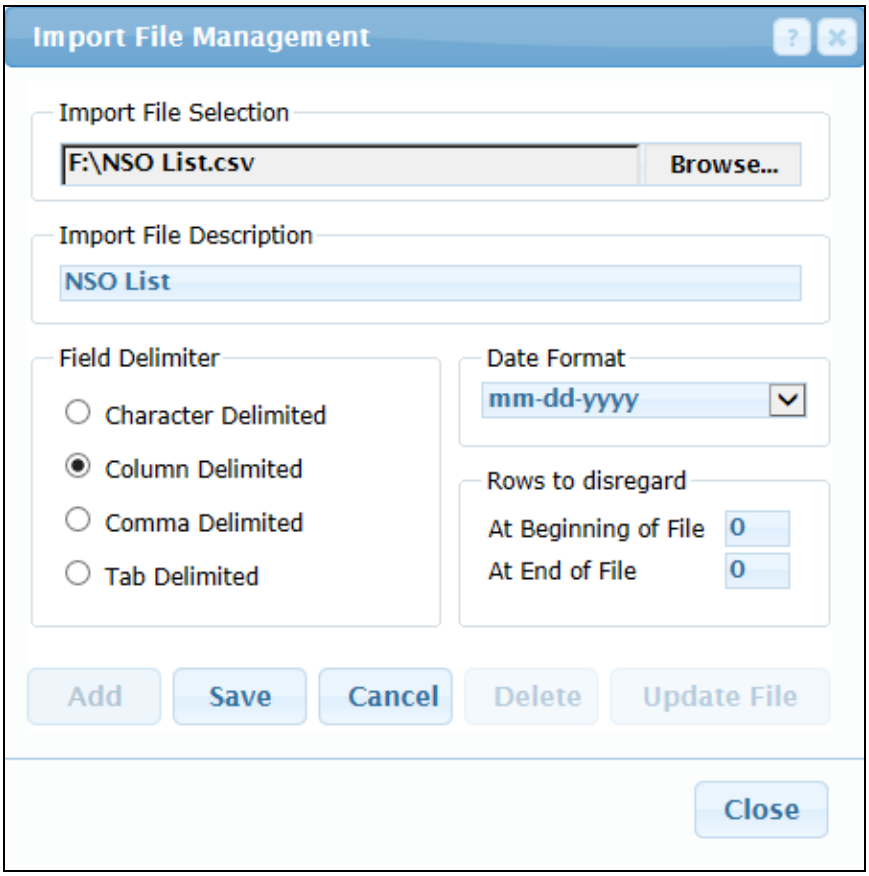
6. Disregard any empty fields on the screen for now. Navigate directly to the MANAGE IMPORT FILES button, and click on it to display AN IMPORT FILE MANAGEMENT screen.

7. Click on ADD. The Import File Selection field will change and display a Browse button and enable the fields. Here is an example:



The options are:

- IMPORT FILE SELECTION: Use to select an import file from a list of previously-created files.
- IMPORT FILE DESCRIPTION: Use to type in a description of the source file (e.g., Late Registration Fees).
- FIELD DELIMITER: Use to specify the manner in which data are separated in the source file.
  - CHARACTER DELIMITED: Use if a special character (such as **|**) separates the data elements in the source file.
  - COLUMN DELIMITED: Use if the data elements in the source file are aligned on columns.
  - COMMA DELIMITED: Use if commas separate the data elements in the source file.

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TAB DELIMITED: Use if tabs separate the data elements in the source file.

- DATE FORMAT: Use to select the format for dates.
- ROWS TO DISREGARD: Use to instruct the system to ignore any rows at the beginning or end of the data file that do not contain student data (e.g., headings and footers).

  AT BEGINNING OF FILE: Use to specify the number of rows to disregard at the front of the file.

  AT END OF FILE: Use to specify the number of rows to disregard at the end of the file.

- ADD: Use to add a new Import File.
- SAVE: Use to store the entries on the screen.
- CANCEL: Use to undo an action that has not yet been saved.
- DELETE: Use to delete an Import File.
- UPDATE FILE: Use to update the selected Import File.
- CLOSE: Use to exit the screen.

8. Click on BROWSE and select the import file to be used.
9. Click on the IMPORT FILE DESCRIPTION field and type a description of the file.
10. In the Field Delimiter panel, click on the button adjacent to the type of file that will be used.
    a. Click on CHARACTER DELIMITED if the source separates its data fields using a character. Typically, the character used is the pipe character (e.g. |). If this option is selected, a field will open adjacent to the label. Type in the character that is used to separate data fields.

       -or-

    b. Click on COLUMN DELIMITED if the source separates its data fields using columns.

       -or-

    c. Click on COMMA DELIMITED if the source separates its data fields using commas.

       -or-

    d. Click on TAB DELIMITED if the source separates its data fields using tabs.
11. Click on DATE FORMAT ▼ and select the format for the date as used in the import.
12. [If applicable] In the Rows to Disregard panel,

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a. Click on the text box adjacent to AT BEGINNING OF FILE and type in the number of rows at the beginning of the import file that should not be included in the import.

b. Click on the text box adjacent to AT END OF FILE and type in the number of rows at the end of the import file that should not be included in the import.

13. Click on SAVE.

14. Click on CLOSE to return to the FILE IMPORT screen.

4.5.1.2 Specify the Record Layout for Data Elements

At this point, each data element must be configured in the RECORD LAYOUT sub-section, depending on the manner in which the data elements in the records are separated. At a minimum, the following data elements must be selected:

Student ID,
Text Phone, and/or Email Address

Character-, Comma-, and Tab-Delimited Formats

Source files that delimit their data elements using characters, commas or tabs may all be specified in the same manner. If the source file uses columns, skip this discussion and refer to the discussion that follows.

1. From the File Import screen, click on BATCH IMPORT SELECTION ▼ and select the file to be imported. This will populate the rest of the fields on the screen and also enable the Import Specification option.

2. Click ON IMPORT SPECIFICATION.

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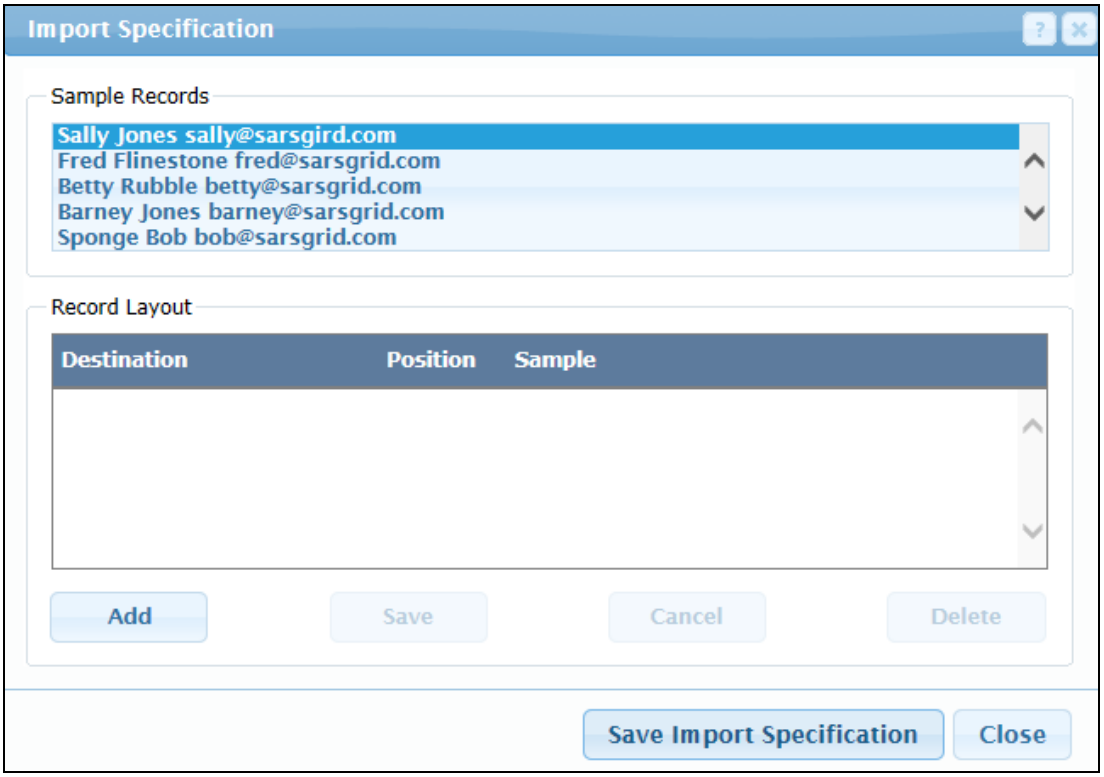
Here is an example of the screen with a few sample records displayed:



The options are:

- SAMPLE RECORDS: Use to view the manner in which the records will be displayed, based on the type of Field Delimiter selected.

Note Several records are provided in the event that certain data elements are contained within some, but not all of, the examples.

- RECORD LAYOUT: Use to insert data elements to be inserted in their proper destination and positions so that the data will be imported properly.

  DESTINATION: Use to select a data element from the drop-down list.

  POSITION: Use to select a position order for the selected data element.

  SAMPLE: Use to display a sample of the data element of the selected record as it will appear in SARS Messages.

- ADD: Use to add a line to receive a data element in the Record Layout field.

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- SAVE: Use to store the data lines in the RECORD LAYOUT sub-screen.
- CANCEL: Use to undo an action that has not yet been saved in the Record Layout sub-screen.
- DELETE: Use to delete the selected data element in the Record Layout sub-screen.
- SAVE IMPORT SPECIFICATION: Use to store the record layout settings for the selected import file.

CLOSE: Use to exit the screen.

3. Click on ADD to enable the first Record Layout field in the Destination and Position columns.

4. Referring to the sample record layout displayed above, click on ▼ in the Destination column and select the description that occurs in the first position in the sample (e.g., Student Name - Full). The options will include all of the data elements that are contained in the selected database, such as:

   Student Name – Full
   Student Name – First
   Student Name – Last
   Text phone – Full
   Text phone – Area Code
   Text phone – Number
   Email address
Appointment - Date
Appointment - Time
Appointment - Duration
Advisor – Full
Advisor – First
Advisor – Last
Advisor Room

Notes If the selected record does not contain a data element to be configured, click on a different one.

5. With the selected data element inserted into the DESTINATION field, click on POSITION ▼ and select the position number for the information. A sample will be displayed in the third column.

6. Click on SAVE.

7. Repeat steps 3 - 6 until each data element in the record is identified and a corresponding position assigned to it.

8. IMPORTANT! When done selecting all of the data elements, click on SAVE IMPORT SPECIFICATION.

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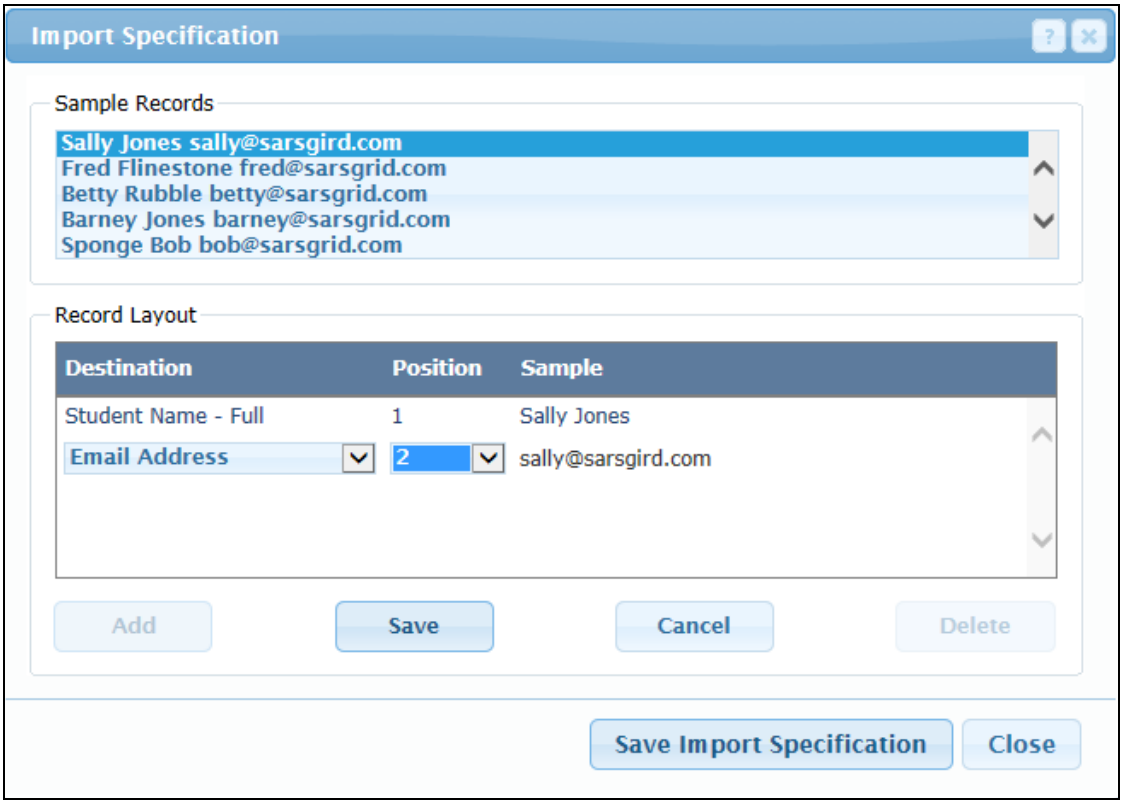
Here is an example:



Warning If you do not click on Save Import Specification, you will need to go back and complete the screen again.

9. Click on CLOSE to return to the File Import screen.

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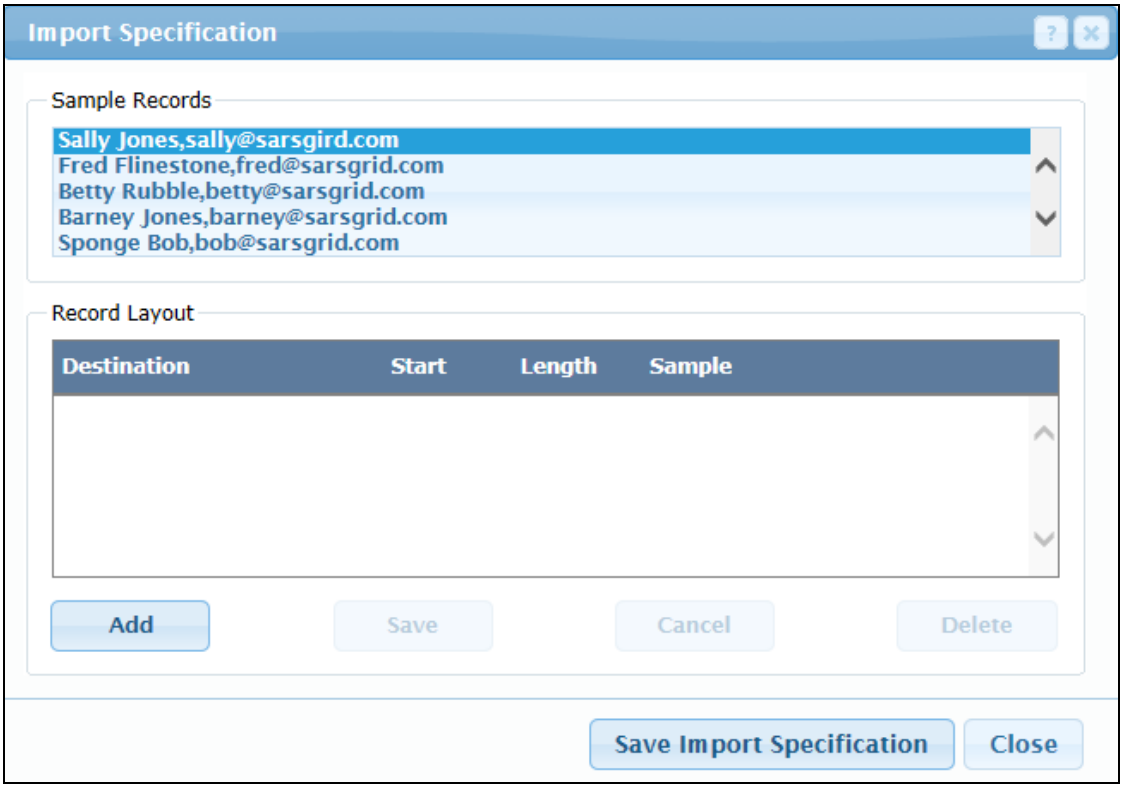
Column-Delimited Formats

Source files that delimit their data elements using columns will need to specify the record layout as discussed below. If the source file uses characters, commas or tabs, refer to the preceding discussion.

The difference for column-delimited formats is that both the Start point and the Length of the data element must be specified, whereas for other formats, only the Position needs to be specified.

1. From the File Import screen, click on BATCH IMPORT SELECTION ▼ and select the file to be imported. This will populate the rest of the fields on the screen and also enable the Import Specification option.

2. Click ON IMPORT SPECIFICATION. Here is an example of the screen with a few sample records displayed:



The options are:

- SAMPLE RECORDS: Use to view the manner in which the records will be displayed, based on the type of Field Delimiter selected.

Note Several records are provided in the event that certain data elements are contained within some, but not all of, the examples.

- RECORD LAYOUT: Use to insert data elements to be inserted in their proper destination and positions so that the data will be imported properly.

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DESTINATION:	Use to select a data element from the drop-down list.
START:	Use to specify the start position for the selected data element.
LENGTH:	Use to select the length of the data element.
SAMPLE:	Use to display a sample of the data element of the selected record as it will appear in SARS Messages.

- ADD: Use to add a line to receive a data element in the Record Layout field.
- SAVE: Use to store the data lines in the RECORD LAYOUT sub-screen.
- CANCEL: Use to undo an action that has not yet been saved in the Record Layout sub-screen.
- DELETE: Use to delete the selected data element in the Record Layout sub-screen.
- SAVE IMPORT SPECIFICATION: Use to store the record layout settings for the selected import file.
- CLOSE: Use to exit the screen.

3. Click on ADD to enable the first Record Layout field in the Destination, Start, and Length columns.

   a. Click on DESTINATION ▼ and select a data element (e.g., Student ID).

   b. Click on START or LENGTH. A FIELD POSITION screen will be displayed. Here is an example:

   c. While holding down the left mouse button, scroll to highlight the section of the line on the sample record containing the related data field, including any blank space that follows (up to the beginning of the next data field). For example, if the Destination is

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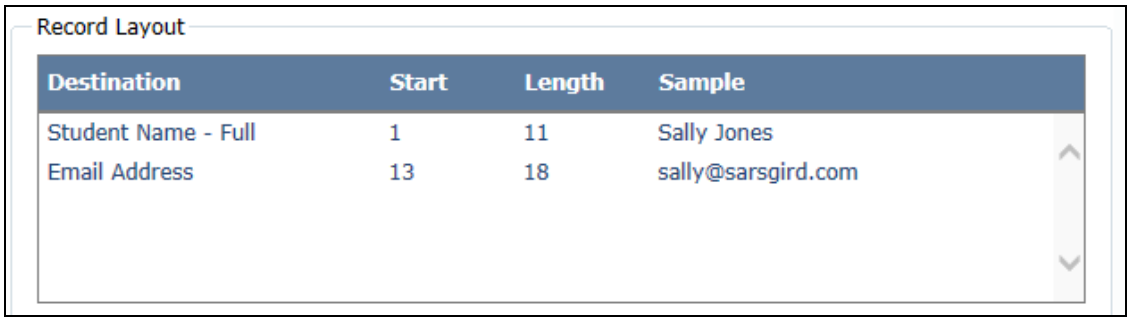
Student Name, highlight the entire Name plus all of the unused space comprising the Student Name data field to the right of the name.

d. Click on OK. This action will record a line in the Record Layout showing the Destination data element, the starting position of the data element, the character length of the data element, and an example of the data element. Here is an example:



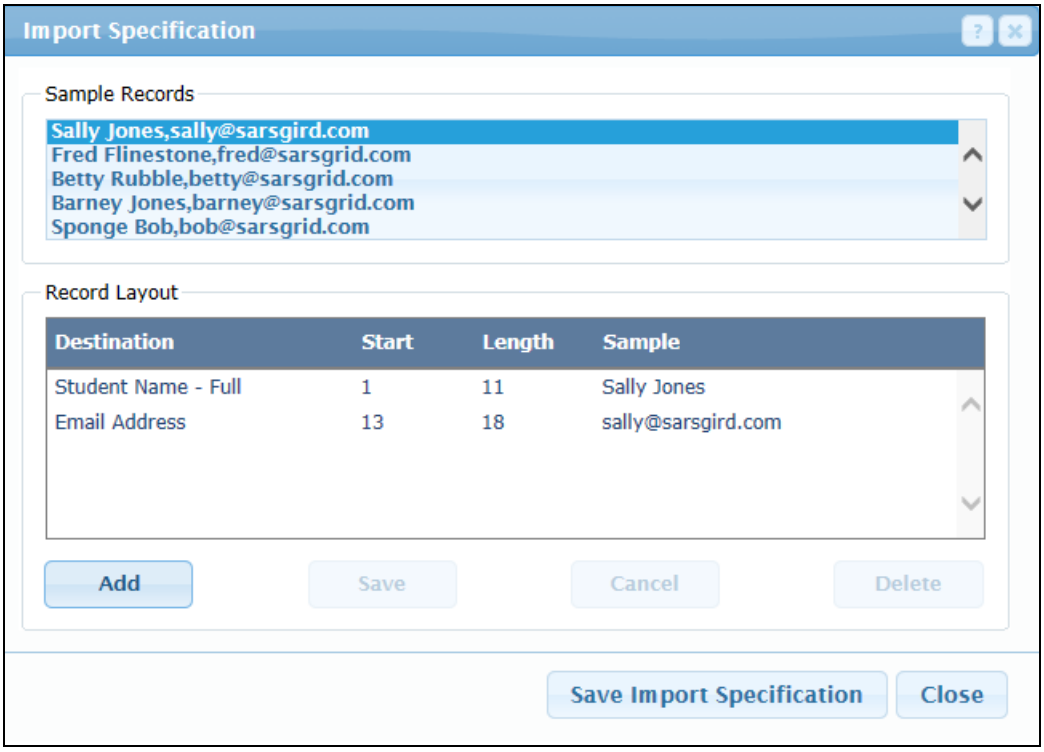
e. Click on SAVE.

4. Repeat step 3 until each data element in the record is identified and a corresponding start position and character length have been assigned to it.

5. When done selecting all of the data elements, click on SAVE IMPORT SPECIFICATION.

Warning If you do not click on Save Import Specification, you will need to go back and complete the screen again.

6. Click on CLOSE to return to the File Import screen. Here is an example of a completed Record Layout for a column-delimited format.



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4.5.2 Schedule the Import

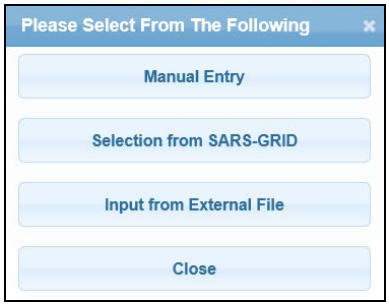
Imports may be set up to be run on a specified schedule or they may be run manually from time to time.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).

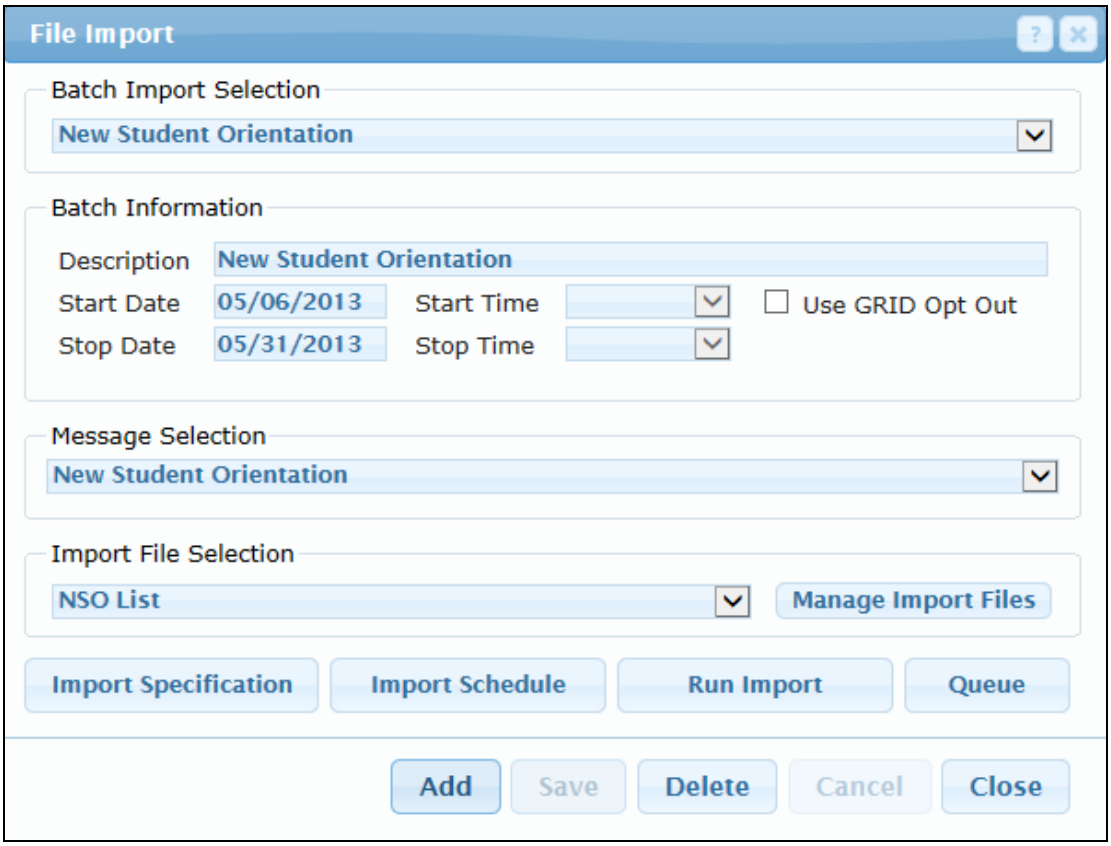
2. Click on BATCHES from the left-hand menu to display the BATCHES screen.

3. Click on APPLICATION ▼ and select the application that contains the import format to be run.

4. Click on ADD to display the following batch selection screen.



5. Click on INPUT FROM EXTERNAL FILE to display the FILE IMPORT screen. Here is an example:



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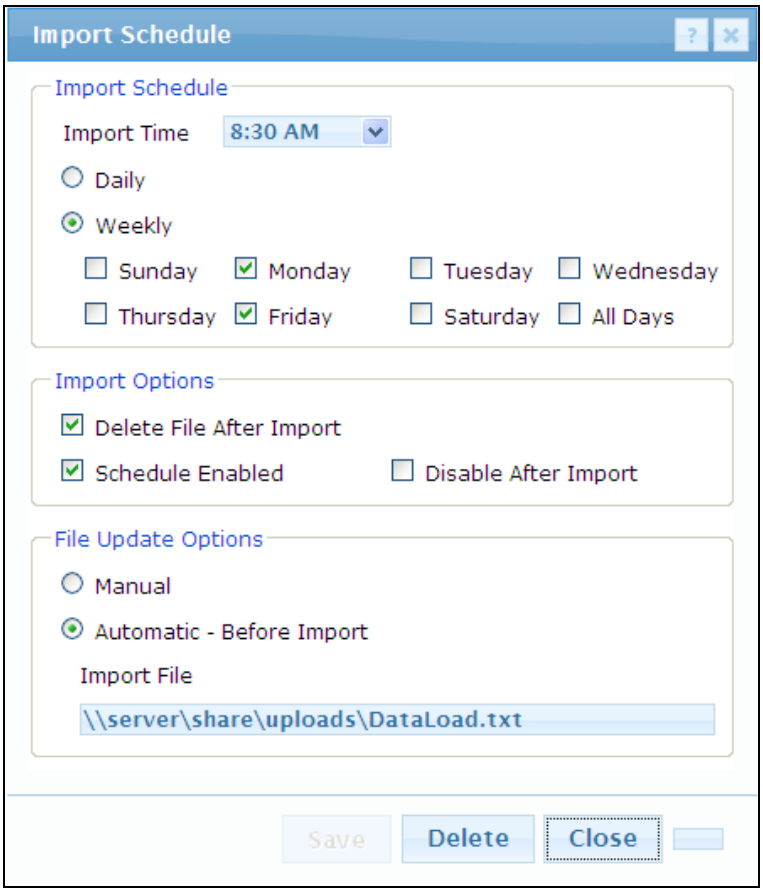
6. From the File Import screen, click on IMPORT SELECTION ▼ and select the file to be imported. This will populate other fields on the screen and also enable IMPORT SCHEDULE option.

7. Click on IMPORT SCHEDULE to specify when the import should be run. Here is an example of the screen:



The options are:

- IMPORT SCHEDULE:

IMPORT TIME:	Use to specify the time of day when the import will be run.
DAILY:	Use to run the import once a day at the specified time.
WEEKLY:	Use to enable the days of the week options, if the import should be run once a week at the specified time.
SUNDAY:	Use to run the import on Sundays.
MONDAY:	Use to run the import on Mondays.
TUESDAY:	Use to run the import on Tuesdays.

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WEDNESDAY: Use to run the import on Wednesdays.

THURSDAY: Use to run the import on Thursdays.

FRIDAY: Use to run the import on Fridays.

SATURDAY: Use to run the import on Saturdays.

ALL DAYS: Use to run the import on all days.

- IMPORT OPTIONS:

  DELETE FILE AFTER IMPORT: Use to specify that the Import File should be deleted after the import process has been completed.

  SCHEDULE ENABLED: Use to specify that the Import File will be processed on the specified schedule.

  DISABLE AFTER IMPORT: Use to specify that the Import File should be run only once, after which it will be disabled, but not deleted.

- FILE UPDATE OPTIONS: Use to specify whether to update the Import File manually or automatically.

  MANUAL: Use to specify that the Import File will be updated manually, as needed.

  AUTOMATIC - BEFORE IMPORT: Use to specify that the Import File will be updated automatically. The file will be updated just prior to the import process.

  IMPORT FILE: Used to display the path of the Import File.

- SAVE: Use to save the import schedule criteria.

- DELETE: Use to delete the Import File.

- CLOSE: Use to exit the screen.

8. In the Import Schedule panel,

   a. Click on IMPORT TIME ▼ and select the time of day when the import should be performed.

   b. Click on DAILY if the import should be performed every day,

      -or-

      Click on WEEKLY if the import should be performed once a week; then click on the checkbox(es) adjacent to the day(s) of the week that the import should be performed.

9. In the Import Options panel,

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a. Click on DELETE FILE AFTER IMPORT to delete the Import File after it has been run, and/or

b. Click on SCHEDULE ENABLED to process the Import File on the specified schedule, and/or

c. Click on DISABLE AFTER IMPORT to run the Import File once and then disable it.

10. In the File Update Options panel,

    a. Click on MANUAL to update the Import File only as needed.

    -or-

    b. Click on AUTOMATIC - BEFORE IMPORT to update the Import file just prior to each import process.

    c. Note the path in the IMPORT FILE field. If this is incorrect, enter the correct path for the Import file.

11. Click on SAVE. If the file has been scheduled to run automatically, no further action is required. The import will be run on the scheduled days and time. If the file has been scheduled to be run manually, proceed to Section 4.5.3, below.

Note Make sure that the SARS Messages Import Service is started or running. For more information, see Section 4.7 in this part.

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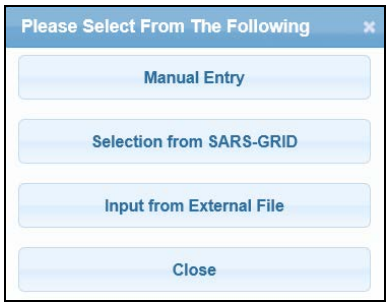
4.5.3 Run the Import Manually

If an Import File is not scheduled to be run on a scheduled basis, it may be run manually at any time.

Note Make sure that the SARS Messages Import Service is started or running. For more information, see Section 4.7 in this part.

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).
2. Click on BATCHES from the left-hand menu to display the BATCHES screen.
3. Click on APPLICATION ▼ and select the application that contains the import format to be run.
4. Click on ADD to display the following batch selection screen.



5. Click on INPUT FROM EXTERNAL FILE to display the FILE IMPORT screen.

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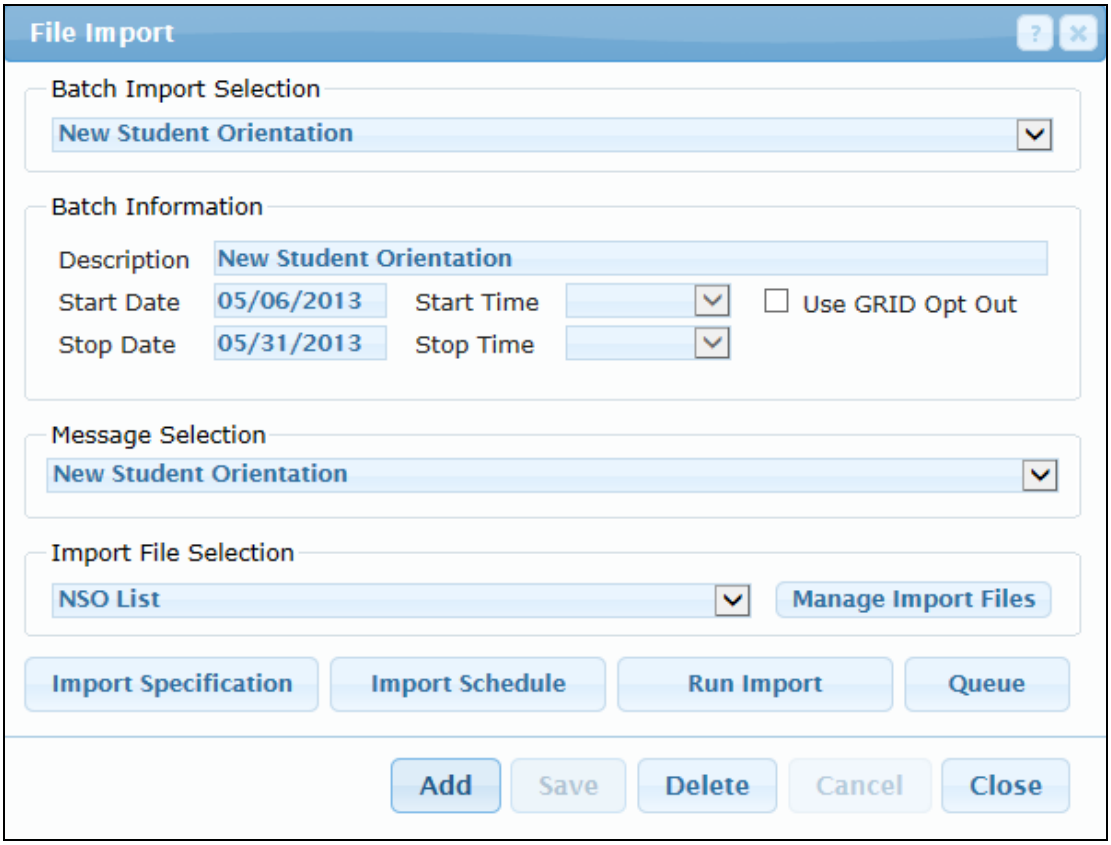
Here is an example:



6. From the File Import screen, click on IMPORT SELECTION ▼ and select the file to be imported. This will populate other fields on the screen and also enable the RUN IMPORT button.

7. Click on RUN IMPORT. A confirmation screen will be displayed.

8. Click on OK. The import process will run every 60 seconds. An Import Progress screen will display the status.

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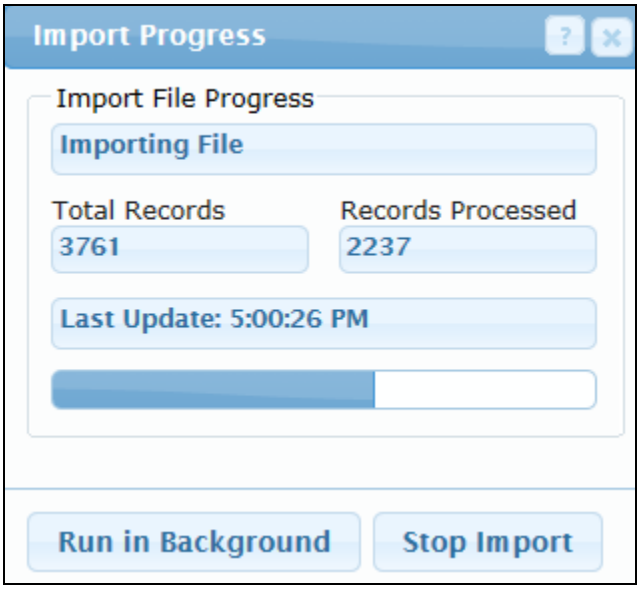
Here is an example:



The options are:

- IMPORT FILE PROGRESS: Used to display the status of the file.
- TOTAL RECORDS: Used to display the total number of records in the import file.
- RECORDS PROCESSED: Used to display the number of records that have been processed.
- LAST UPDATE: Used to display the time of the last update.
- RUN IN BACKGROUND: Use to place the Import Progress screen in the background, where it will continue to run.
- STOP IMPORT: Use to stop the import process.

9. When the import process is completed, the following message will be displayed.

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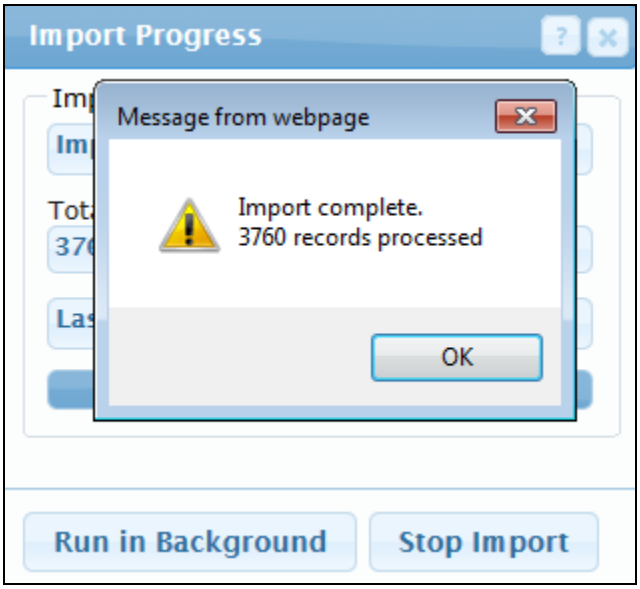
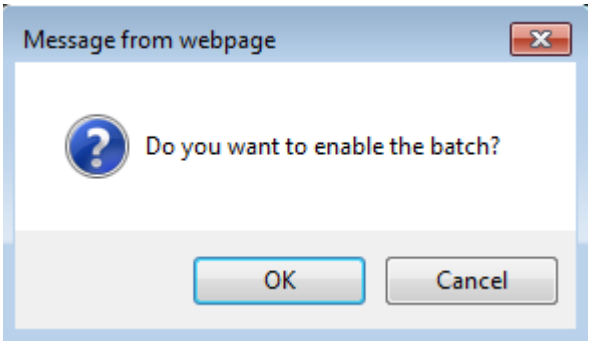
Here is an example:



5. Click on OK. The following screen will be displayed:



6. Click on OK to enable the batch, or click on CANCEL to add the batch without enabling it. The user may enable the batch later.

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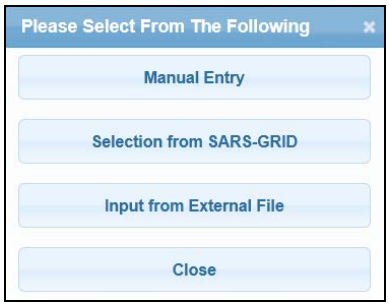
4.5.4 Update an Import File

1. Using your web browser, log in to the SARS Messages application via the college's public website (to be provided by college).
2. Click on BATCHES from the left-hand menu to display the BATCHES screen.
3. Click on APPLICATION ▼ and select the application for which the import file is to be updated.
4. Click on ADD to display the following batch selection screen.



5. Click on INPUT FROM EXTERNAL FILE to display the FILE IMPORT screen.
6. Click on MANAGE IMPORT FILES to display the IMPORT FILE MANAGEMENT screen.
7. Click on IMPORT FILE SELECTION ▼ and select the import file that is to be updated.
8. Click on UPDATE FILE. A confirmation message will be displayed.
9. Click on OK. The Import File Selection field will be emptied to accept a new file.
10. Click on Browse and select the desired Import File. Note that the rest of the information on the Import File Management screen will remain populated.
11. Click on SAVE.
12. Click on CLOSE.

4.5.5 Make Deletions

The following elements may be deleted from the File Import Screen:

- An Import file
- An Import Selection from the File IMPORT screen
- A Data Element from the IMPORT SPECIFICATIONS screen

Warning Exercise caution when deleting data elements for student imports. At a minimum, a valid text number and/or an e-mail address are required.

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4.5.5.1 Delete an Import File

1. From your web browser, log in to the SARS Messages web application URL.
2. Click on BATCHES from the left-hand menu to display the BATCHES screen.
3. Click on ADD to display the selection screen.
4. Click on IMPORT FROM EXTERNAL FILE to display the File Import screen.
5. Click on MANAGE IMPORT FILES to display the Import File Management screen.
6. Click on IMPORT FILE SELECTION ▼ and select the import file to be deleted. The DELETE button will be activated.
7. Click on DELETE. A confirmation message will be displayed.
8. Click on OK to confirm the action.
9. Click on CLOSE to exit the screen.

4.5.5.2 Delete an Import Selection

1. From your web browser, log in to the SARS Messages web application URL.
2. Click on BATCHES from the left-hand menu to display the BATCHES screen.
3. Click on ADD to display the selection screen.
4. Click on IMPORT FROM EXTERNAL FILE to display the File Import screen.
5. Click on IMPORT SELECTION ▼ and select the import selection file to be deleted.
6. Click on DELETE. A confirmation message will be displayed.
7. Click on OK to confirm the action. .
8. Click on CLOSE to exit the screen.

4.5.5.3 Delete a Data Element from the Import Specifications Screen

1. From your web browser, log in to the SARS Messages web application URL.
2. Click on BATCHES from the left-hand menu to display the BATCHES screen.
3. Click on ADD to display the selection screen.
4. Click on IMPORT FROM EXTERNAL FILE to display the File Import screen.
5. Click on IMPORT SELECTION ▼ and select the import selection file.
6. Click on IMPORT SPECIFICATION to display the import specification screen for the selected file.

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7. Click on the data element to be deleted.

8. Click on DELETE. A confirmation message will be displayed.

9. Click on OK to confirm the action. The destination line will be deleted from the Record Layout.

10. Click on SAVE IMPORT SPECIFICATION.

11. Click on CLOSE.

4.6 Batch Import Quick Setup

A small batch of students can be created (and saved as a file for future use) in a few relatively simple steps.

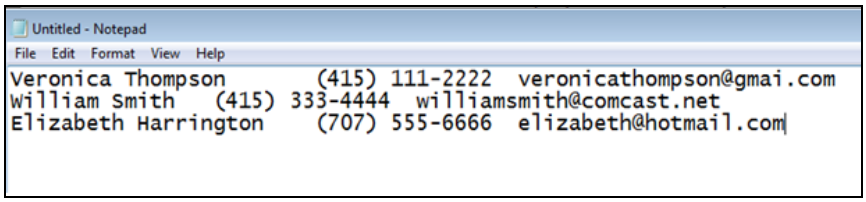
1. Create a template

2. Add a message and link it to the new template

3. Create a batch using the Notepad

   a. Open the Windows Notepad. (Click on **Start**, click on **Programs**, click on **Accessories**, click on **Notepad**). Click on **Format**, select **Font**, and choose **Courier**.

   b. On the Notepad, type the first data element (e.g., the student's full name) and then press the **Tab** key. Then type the second data element (e.g., the student's email address), and then press the **Tab** key. Then type a third data element (e.g., the student's text phone number). Continue to all other students names and their data elements. Here is an example:



   c. Click on **File**, then click on **Save As**. Type a suitable name in the FILE NAME field (e.g., **Message list 9-20.txt** in the example below). Be sure to write down the file name and path.

   d. Click on **Save**.

   e. Click on the **X** to close the Notepad.

4. Link the message and batch by following the instructions for setting up a batch using the Input from External File Method (see Section 4.5 in this Part).

5. Proceed with the import process.

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4.7 Recommended Routines

DAILY:

1. After arriving at the office in the morning:

    a. Run a Daily Activity Report and a Cancellation Report for the previous day's batches.

    b. Note any false results due to missing or incorrect text phone numbers or email addresses that may need to be corrected in the student database.

    c. If students had the option to cancel their appointments, note those appointments that were cancelled for appropriate follow up.

2. Before leaving the office at the end of the day:

    a. Check the BATCHES screen to make sure that the batch files to be run during the evening have been extracted and are ready to be run.

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PART V — TROUBLESHOOTING AND MAINTENANCE

5.1 Troubleshooting

This section is intended to assist the user in troubleshooting problems when text and/or email message batches are not being sent out properly. If these steps do not help resolve the problem, the system administrator may contact SARS Software Products, Inc. and use "Go To Assist" for online assistance (see Section 5.2, below).

5.1.1 Email Batches

This option sends email messages. Students who do not have a primary or secondary email address listed in the SARS database and/or do not have "Email" checked as a desired contact method will not be contacted at all. The following conditions are required for email messages to be sent out:

1. ☑ The college has a valid license for either EMAIL or EMAIL & SMS.
2. [If using SARS database] In **SARS Anywhere > Admin > Student Maintenance**:
   - ☑ The student's PRIMARY EMAIL ADDRESS must be entered.

     -and/or-

   - ☑ The student's SECONDARY EMAIL ADDRESS must be entered.
   - ☑ EMAIL must be checked as a desired Student Contact Method.
3. In **SARS Messages > Settings > SMTP Servers**:
   - ☑ The Email fields on the SMTP Servers screen must be specified, saved and tested.
4. In **SARS Messages > Settings > Global Settings**:

   In the General Options panel,
   - ☑ The GLOBAL START TIME and the GLOBAL STOP TIME values must be within the EARLIER START TIME and LATEST STOP TIME.

   In the Logging Options panel,
   - ☑ The desired logging options must be specified.

   In the Email Options panel,
   - ☑ The default SMTP server must be specified.
   - ☑ The throttling options must be specified.
   - ☑ The selected options must be saved.
5. In **SARS Messages > Messages > SMTP**:

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- ☑ An Email Template must be created or edited
- ☑ The Email Description must be created for the corresponding Email Template.

6. In **SARS Messages > Application Settings**:

   In the General Options panel,

   - ☑ The COMMUNICATION OPTION value must be EMAIL or EMAIL & SMS.
   - ☑ The Application must not be disabled.

   In the Schedule Options panel,

   - ☑ The START TIME value and the STOP TIME value must be established.

     -or-

   - ☑ The ON DEMAND option must be selected.

   In the Message Options panel,

   - ☑ The type of message to be sent must be checked and the desired message selected.

   [If using SARS database] In the SARS·GRID Integration Options panel,

   - ☑ The Use SARS Integration must be checked.
   - ☑ The APPOINTMENT LOOKUP TIME must be set for a time that is later than "now."
   - ☑ The desired number of APPOINTMENT NOTIFICATION DAYS in advance must be selected.

7. [If using SARS database] In **SARS Messages > Schedule Codes**:

   - ☑ Schedule Codes must be selected and saved for the selected application.

8. In **SARS Messages > Batches**:

   - ☑ An email batch must have been created.
   - ☑ The batch must be checked as "enabled."

   Note
   Batches created using the SARSMSGS SERVICES program will be created and enabled automatically.

   - ☑ The message batch must contain student records in the # ENTRIES column.

9. In **SARS Messages Services**:

   - ☑ The SARS MSGS SERVICE application must be started. (It should be left in the "started" mode at all times.).

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5.1.2 SMS Batches

This option sends text messages. Students who do not have a text phone listed in the database and/or do not have "Text" checked as a desired contact method will not receive a text message. The following conditions are required for text messages to be sent out:

1. ☑ The college has a valid license for SMS or EMAIL & SMS.
2. [If using SARS·database] In **SARS·Anywhere > Admin > Student Maintenance**:
   - ☑ The student's TEXT PHONE NUMBER must be entered.
   - ☑ TEXT must be checked as a desired Student Contact Method.
3. In **SARS Messages > Settings > SMS Servers**:
   - ☑ The fields on the SMS Servers screen must be specified, saved and tested.
4. In **SARS Messages > Settings > Global Settings**:

   In the General Options panel,
   - ☑ The GLOBAL START TIME and the GLOBAL STOP TIME values must be within the EARLIER START TIME and LATEST STOP TIME.

   In the Logging Options panel,
   - ☑ The desired logging options must be specified.

   In the SMS Options panel,
   - ☑ The Default SMS Server must be specified.
5. In **SARS Messages > Messages > SMS**:
   - ☑ An SMS Template must be created or edited.
   - ☑ The Text Description must be created for the corresponding SMS Template.
6. In **SARS Messages > Application Settings**:

   In the General Options panel,
   - ☑ The COMMUNICATION OPTION value must be SMS or EMAIL & SMS.
   - ☑ The Application must not be disabled.

   In the Schedule Options panel,
   - ☑ The START TIME value and the STOP TIME value must be established.

     -or-
   - ☑ The ON DEMAND option must be selected.

   In the Message Options panel,

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☑ The type of message to be sent must be checked and the desired message selected.

[If using SARS database] In the SARS·GRID Integration Options panel,

☑ The Use SARS Integration must be checked.

☑ The APPOINTMENT LOOKUP TIME must be set for a time that is later than "now."

☑ The desired number of APPOINTMENT NOTIFICATION DAYS in advance must be selected. .

In the SMS Options panel,

☑ The SMS Server must be specified.

☑ If desired, the CANCEL response must be specified and saved.

7. [If using SARS database] In **SARS Messages > Schedule Codes**:

   ☑ Schedule Codes must be selected and saved.

8. In **SARS Messages > Batches**:

   ☑ A text message batch must have been created.

   ☑ The message batch must be in the Play or Enabled mode.

   Note
   Batches created using the SARSMSGS SERVICES program will be created and enabled automatically.

   ☑ The message batch must contain student records in the # ENTRIES column.

9. In **SARS Messages Services**:

   ☑ The SARSMSGS SERVICES application must be started. (It should be left in the "started" mode at all times.)

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PART VI — REPORTS

6.0 Overview

- REQUIRED ACCESS PERMISSIONS: ☑ REPORTS – APPLICATION
- OPTIONAL ACCESS PERMISSIONS: ☑ REPORTS – BATCH
  ☑ REPORTS – STATISTICAL

The following reports are discussed in this section:

6.1 Activity Summary Report

6.2 Bad Text Phone Report

6.3 Cancellation Report

6.4 Daily Activity Report

6.5 No Contact Data Report

6.6 No Contact Option Report

6.7 SMS Opt-Out Report

6.8 SMS Response Report

6.9 Service Status Report

Section 6.10 discusses the steps for scheduling, viewing and printing a report.

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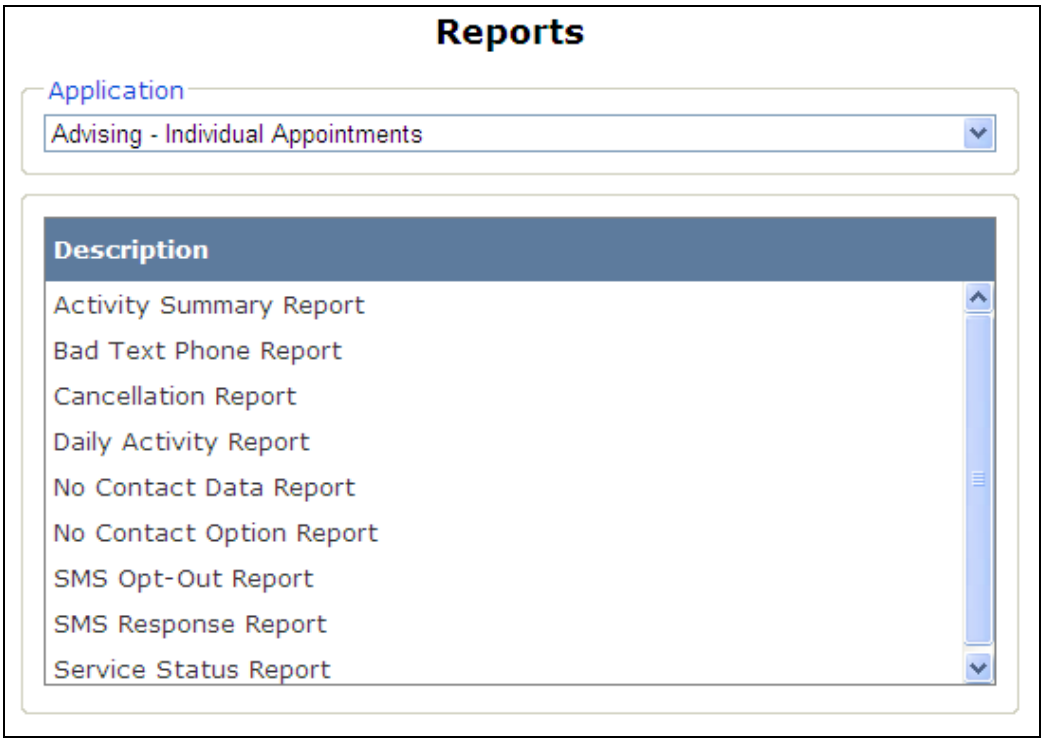
To generate a report, follow the steps listed below.

1. Navigate to the SARS Messages web application and log in.

2. Click on REPORTS from the left-hand menu. Here is an example of the screen:



3. Click on APPLICATION ▼ and select the application for which a report is to be generated.

Note
If only one application is available, the system will select that application automatically.

4. Click on the desired report from the menu. Proceed depending on the selected report.

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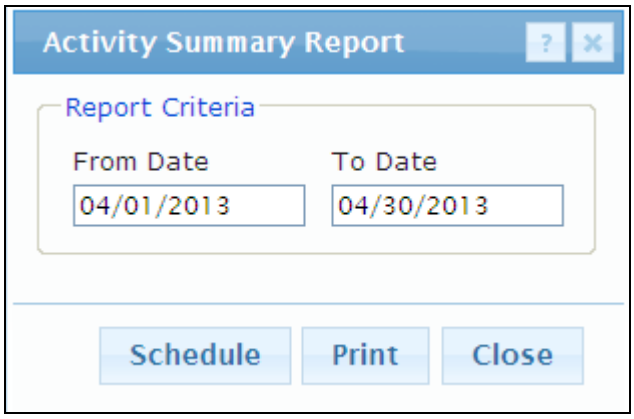
6.1 Activity Summary Report

The Activity Summary Report is used to display, for a selected application and date range, all batches processed. For each batch, the report displays the total number of records processed; the number of SMS (text) messages pending, sent, failed and total; and the number of email messages pending, sent, failed, and total. For failures, separate totals are displayed for each reason that the message failed to go through: Bad Text Phone, Do Not Contact Via SMS, Bad Email Address, and Do Not Contact Via Email.

Here is an example of the criteria screen:



The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SCHEDULE: Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
- PRINT: Use to display the report for viewing or printing.
- CLOSE: Use to exit the screen.

1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. To schedule, view or print the report, see Section 6.10.

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Here is an example of the ACTIVITY SUMMARY REPORT:

Activity Summary Report

Advising - Individual Appointments

07/16/2012 - 07/22/2012

Batch Description			Total Records
Appointment Reminders for - 7/19/2012			4
SMS			
Pending	Sent	Failed	Total
0	4	0	4
Email			
Pending	Sent	Failed	Total
4	0	0	4
Failures			
Bad Text Phone	Do Not Contact Via SMS	Bad Email Address	Do Not Contact Via Email
0	0	0	0

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6.2 Bad Text Phone Report

The Bad Text Phone Report is used to display, for a selected application and date range, all batches processed in which a bad text phone number was recorded. For each batch, the report displays a list of students with a bad text phone, including Student ID, Student Name, and the Text Phone. If the Text Phone field is blank, the student does not have a text phone listed in the system. This report may be used to add or correct a student's text phone in the database.

Here is an example of the criteria screen:

The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SCHEDULE: Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
- PRINT: Use to display the report for viewing or printing.
- CLOSE: Use to exit the screen.

1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. To schedule, view or print the report, see Section 6.10.

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Here is an example of a BAD TEXT PHONE REPORT:

Bad Text Phone Report

Advising - Individual Appointments

10/01/2012 - 05/14/2013

Batch Description		
Appointment Reminder		
Student ID	Student Name	Text Phone
2222222	JOHNSON, SUE	

Batch Description		
Appointment Reminder		
Student ID	Student Name	Text Phone
5555555	RAMIREZ, KIMBERLY	888-7878

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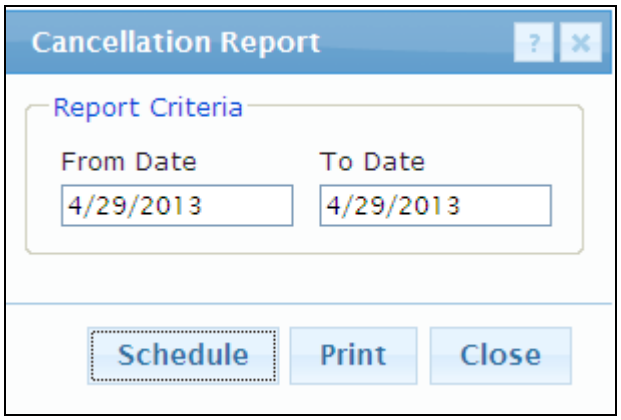
6.3 Cancellation Report

The Cancellation Report displays, for the selected application and date range, a list of batches that include appointments cancelled by students in response to a reminder message from SARS Messages. This report may be used to update the schedule and to re-contact those students to schedule another appointment. The information displayed on the report includes Student ID, Student Name, Appointment Date, Appointment Time, the name of the advisor for each appointment that was cancelled, and a check mark in a cancellation column to indicate that the appointment was successfully cancelled in SARS Anywhere. If no checkmark appears, either AUTO APPLY CANCELLATIONS is not checked on the APPLICATION SETTINGS screen, or an error prevented the cancellation from removing the appointment from SARS Anywhere. In this case, the cancellation must be performed manually on THE GRID.

The Cancellation Report is available only if the SARS Messages application is using the SARS database and the application is set up to allow cancellations.

Here is an example of the criteria screen:



The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SCHEDULE: Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
- PRINT: Use to display the report for viewing or printing.
- CLOSE: Use to exit the screen.

1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. To schedule, view or print the report, see Section 6.10.

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Here is an example of the layout for the CANCELLATION REPORT:

Cancellation Report

Advising - Individual Appointments

03/01/2013 - 05/14/2013

Batch Description					
Appointment Reminders					
Student ID	Student Name	Appt. Date	Appt. Time	Advisor	Cancelled
2222222	JOHNSON, SUE	5/14/2013	1:00 PM	John Adams	☑

Batch Description					
Appointment Reminders					
Student ID	Student Name	Appt. Date	Appt. Time	Advisor	Cancelled
3333333	PETERS, LARRY	3/12/2013	9:00 AM	Abraham Lincoln	☐

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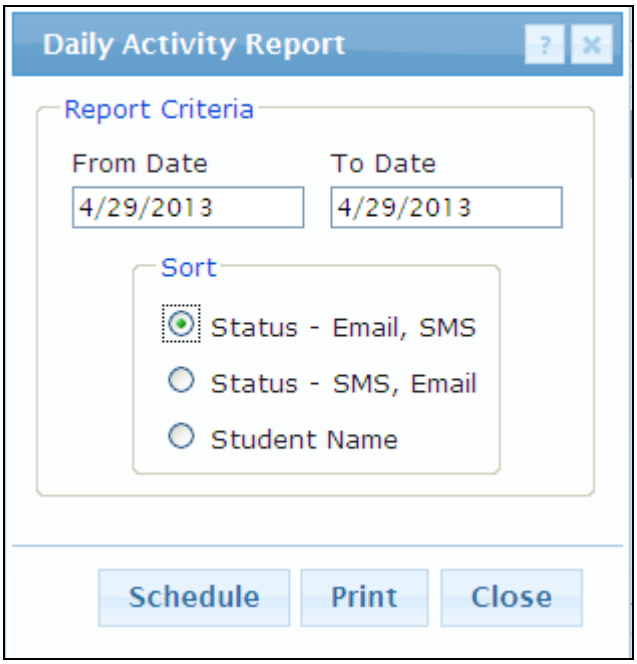
6.4 Daily Activity Report

The Daily Activity Report displays, for the selected application and date range, the status of each message sent for a selected message batch. Information includes the following: A description of the batch, Student ID, Student Name, Email Address, Email Sent (True, False or Pending), Text Phone, SMS Status (Completed, Failed or Pending), and the Last Action Time.

Here is an example of the criteria screen:



The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SORT: Use to select the manner in which the report will be sorted.
  - STATUS - EMAIL, SMS: Use to sort the report first by Email status and then by SMS status.
  - STATUS - SMS, EMAIL: Use to sort the report first by SMS status and then by Email status.
  - STUDENT NAME: Use to sort the report by Student Name.
- SCHEDULE: Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
- PRINT: Use to display the report for viewing or printing.
- CLOSE: Use to exit the screen.

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1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. In the Sort panel,
   a. Click on STATUS - EMAIL, SMS to sort the report first by Email status and then by SMS status,

      -or-

   b. Click on STATUS - SMS, EMAIL to sort the report first by SMS status and then by Email status,

      -or-

   c. Click on STUDENT NAME to sort the report by Student Name.
4. To schedule, view or print the report, see Section 6.10.

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Here is an example of the DAILY ACTIVITY REPORT.

Daily Activity Report

Advising - Individual Appointments

07/17/2012 - 07/22/2012

Batch Description						
Appointment Reminders for - 7/19/2012						
Student ID	Student Name	Email Address	Email Status	Text Phone	SMS Status	Last Action Time
3333333	RED, ROBERT	rred@nbcc.edu	Pending	4151234567	Completed	7/18/2012 3:23:18 PM
4444444	GREEN, GEORGE	ggreene@nbcc.edu	Pending	4155432167	Completed	7/18/2012 3:23:18 PM
6666666	ORANGE, OROVILLE	jim1@sarsgrid.com	Pending	4156789012	Completed	7/18/2012 3:23:18 PM
2222222	BROWN, ROBERT	rbrown@nbcc.edu	Pending	5105551212	Completed	7/18/2012 3:27:18 PM

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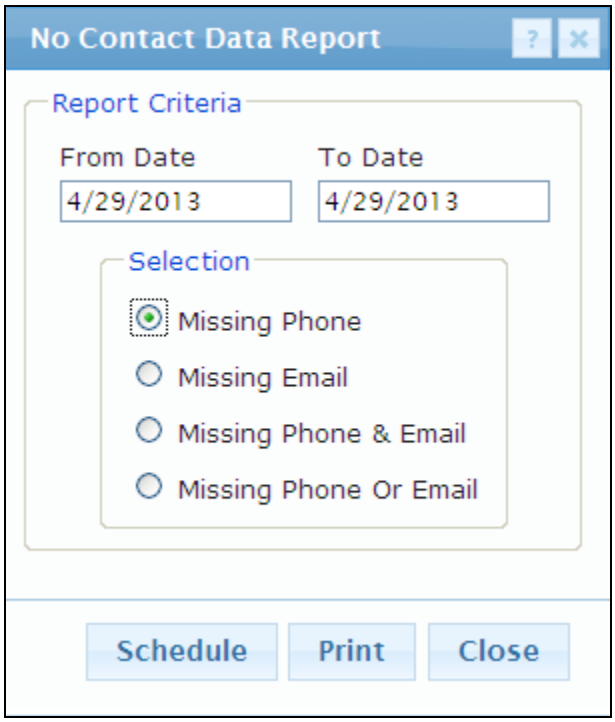
6.5 No Contact Data Report

The No Contact Data Report is used to display, for a selected application and date range, a list of any messages that failed because of a missing text phone or missing email address, or both, in SARS Anywhere, an import batch, or a manually-created batch.

It displays, for a selected application and date range, the Batch Description, Student ID, Student Name, Email Address, Email Status, Text Phone, and SMS Status.

Here is an example of the criteria screen:



The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SELECTION: Use to select the criterion for the report.

  MISSING PHONE: Use to display only those messages that could not be sent because the text phone number is missing in SARS Anywhere, an import batch, or a manually created batch.

  MISSING EMAIL: Use to display only those emails that could not be completed because the email address is missing in SARS Anywhere, an import batch, or a manually created batch.

  MISSING PHONE & EMAIL: Use to display both text messages and emails that could not be sent because they are missing in SARS Anywhere, an import batch, or a manually created batch.

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MISSING PHONE OR EMAIL:	Use to display both text messages and emails that could not be completed because one or the other or both are missing in SARS Anywhere, an import batch, or a manually created batch.
• SCHEDULE:	Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
• PRINT:	Use to display the report for viewing or printing.
• CLOSE:	Use to exit the screen.

1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. In the Selection panel,
   a. Click on MISSING PHONE to generate the report for missing text phone numbers.

      -or-

   b. Click on MISSING EMAIL to generate the report for missing email addresses,

      -or-

   c. Click on MISSING PHONE & EMAIL to generate the report for both missing text phone numbers and missing email addresses,

      -or-

   d. Click on MISSING PHONE OR EMAIL to generate the report for either a text phone or an email, or both, are missing.
4. To schedule, view or print the report, see Section 6.10.

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Here is an example of a NO CONTACT DATA REPORT.

No Contact Data Report

Advising - Individual Appointments

03/01/2013 - 05/14/2013

Batch Description					
Appointment Reminder					
Student ID	Student Name	Email Address	Email Status	Text Phone	SMS Status
2222222	JOHNSON, SUE		Completed		Invalid Text Phone

Batch Description					
Appointment Reminder for - 3/25/2013					
Student ID	Student Name	Email Address	Email Status	Text Phone	SMS Status
6985478	Gerri Killian		Invalid Email Address	2175386	Invalid Text Phone

Batch Description					
Appointment Reminder for - 3/11/2013					
Student ID	Student Name	Email Address	Email Status	Text Phone	SMS Status
5874521	HILLARD, DARRIN	darrinh@gmail.com	Completed		Invalid Text Phone

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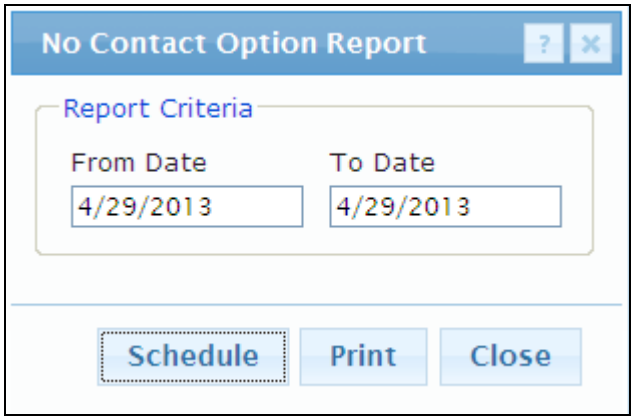
6.6 No Contact Option Report

The No Contact Option Report is used to display, for a selected application and date range, a list of any messages that were sent to students for whom either the CONTACT BY TEXT PHONE or the CONTACT BY EMAIL has not been selected in the SARS database. This report differs from the No Contact Data Report (see Section 6.5 in this part) in that email addresses and text phone numbers may exist for these students in the database, but neither contact option has been checked in SARS Anywhere.

It displays, for a selected application and date range, the Batch Description, Student ID, Student Name, Email Address, Email Status, Text Phone, and SMS Status.

Here is an example of the criteria screen:



The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SCHEDULE: Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
- PRINT: Use to display the report for viewing or printing.
- CLOSE: Use to exit the screen.

1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. To schedule, view or print the report, see Section 6.10.

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Here is an example of the layout for the NO CONTACT OPTION REPORT.

No Contact Option Report

Advising - Individual Appointments

03/01/2013 - 05/14/2013

Batch Description					
Appointment Reminder					
Student ID	Student Name	Email Address	Email Status	Text Phone	SMS Status
5555555	WHITE, WILLIAM	william@sarsgrid.com	Email Opt Out	(___) ___-____	SMS Opt Out
1111111	JOHN SMITH	johnsmith@sarsgrid.com	Email Opt Out	(415) 555-1212	SMS Opt Out
3333333	HILL, JEFFERY	jhill@hotmail.com	Email Opt Out	(415) 666-4545	SMS Opt Out

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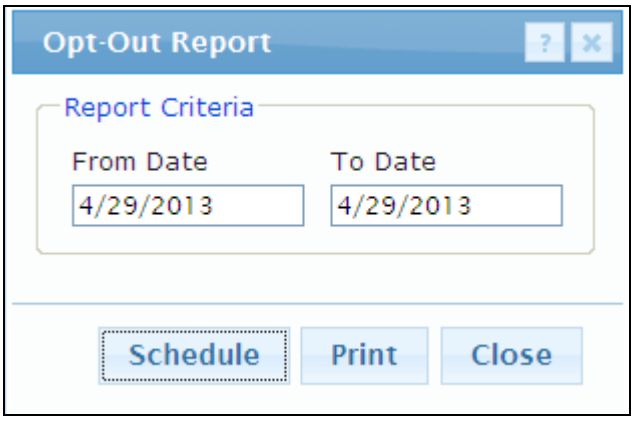
6.7 SMS Opt Out Report

The SMS Opt Out Report is used to view information about students who have opted out of receiving messages from the college.

It displays, for the selected date range, a list of batch descriptions. For each batch description, the report lists the Student ID, Student Name, and Text Phone number of each student who has opted out.

Here is an example of the criteria screen:



The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SCHEDULE: Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
- PRINT: Use to display the report for viewing or printing.
- CLOSE: Use to exit the screen.

1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. To schedule, view or print the report, see Section 6.10.

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Here is an example of the SMS Opt-Out Report.

SMS Opt-Out Report

Appointment Reminders

01/01/2013 - 05/06/2013

Batch Description		
Appointment Reminders for - 5/1/2013		
Student ID	Student Name	Text Phone
1111111	SMITH, JOHN	(415) 555-1212

Batch Description		
Appointment Reminders for - 4/11/2013		
Student ID	Student Name	Text Phone
8888888	FRANKLIN, JARED	(415) 666-1212

Batch Description		
No Shows for - 3/25/2013		
Student ID	Student Name	Text Phone
8745210	GARRETT, LINUS	(415) 777-1212

Batch Description		
Showed for - 2/8/2013		
Student ID	Student Name	Text Phone
3698521	HUBBORD, SALLY	(415) 888-4545

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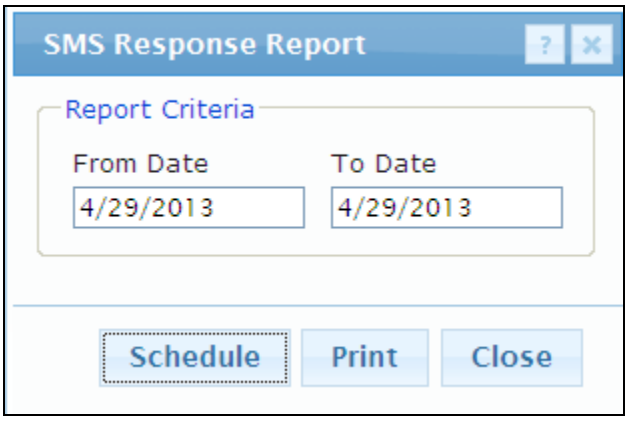
6.8 SMS Response Report

The SMS Response Report is used to display a list of students who have responded to a message (e.g., cancelled an appointment).

It displays, for the selected date range, a list of batch descriptions. For each batch description, the report lists the Student ID, Student Name, Text Phone number of each student, as well as the cancellation code used by the student.

Here is an example of the criteria screen:



The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SCHEDULE: Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
- PRINT: Use to display the report for viewing or printing.
- CLOSE: Use to exit the screen.

1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. To schedule, view or print the report, see Section 6.10.

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Here is an example of the SMS Response Report.

SMS Response Report

Appointment Reminders

01/01/2013 - 05/06/2013

Batch Description			
Appointment Reminders for 4/16/2013			
Student ID	Student Name	Text Phone	Response
7777777	BLUE, BETTY	7075551212	C

Batch Description			
Appointment Reminders for - 3/18/2013			
Student ID	Student Name	Text Phone	Response
11111111	SMITH, JOHN	4156661478	C

Batch Description			
Appointment Reminders for - 2/25/2013			
Student ID	Student Name	Text Phone	Response
5555555	WHITE, WILLIAM	5087778963	C

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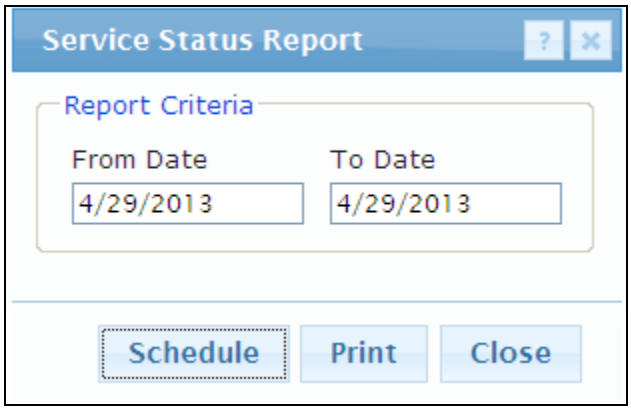
6.9 Service Status Report

The Service Status Report is used to view the status of the various services that run SARS Messages, including Reporting and Logging, Batch Creation, Email, SMS, File Import and File Update services.

It displays, for a selected date range, the total email and the total SMS records sent, as well as the current status of each of the six services. It also displays any service notifications.

Here is an example of the criteria screen:



The options are:

- FROM DATE: Use to select the first date to be included in the report.
- TO DATE: Use to select the last date to be included in the report.
- SCHEDULE: Use to establish a time and frequency for running the report, as well as designating an email address of the entity to receive the report.
- PRINT: Use to display the report for viewing or printing.
- CLOSE: Use to exit the screen.

1. Click on FROM DATE and select the first date to be included in the report.
2. Click on TO DATE and select the last date to be included in the report.
3. To schedule, view or print the report, see Section 6.10.

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Here is an example of the Service Status Report:

SARS·MSGS Service Status Report

04/01/2013 - 05/14/2013

Messages Sent for Date Range	Total Records
Email	1,058
SMS	575

Current Service Status as of - 5/14/2013 12:50 PM		
Reporting & Logging	Batch Creation	Email
Running	Running	Running
SMS	File Import	FileUpdate
Running	Stopped	Running

Service Notifications
None

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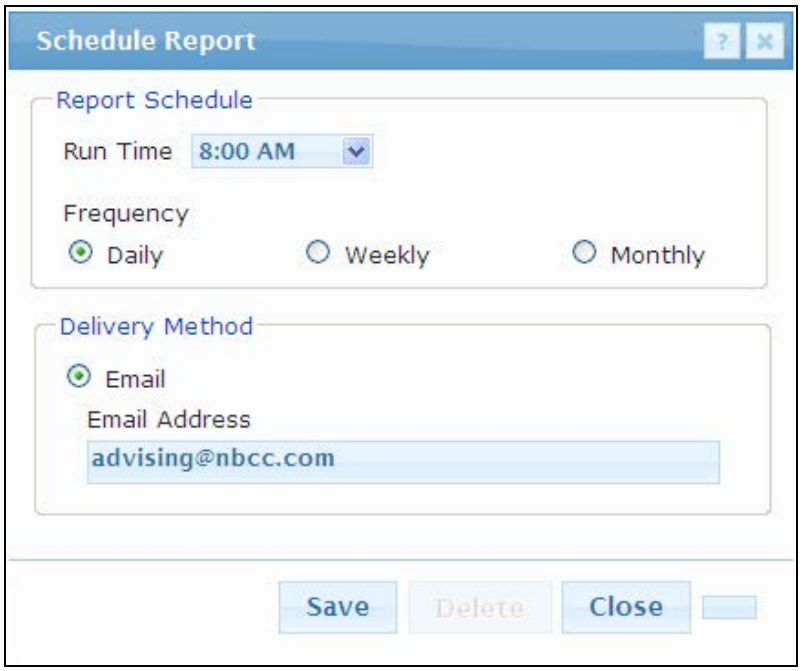
6.10 Schedule, View or Print a Report

1. To schedule a report for a specified time and frequency, from the report criteria screen, click on SCHEDULE. The following screen will be displayed:



The options are:

- REPORT SCHEDULE: Use to establish the run time and frequency for the report to be scheduled.
  - RUN TIME: Use to select the time of day to run the selected report.
  - FREQUENCY:
    - DAILY: Use to run the selected report on a daily basis.
    - WEEKLY: Use to run the selected report on a weekly basis.
    - MONTHLY: Use to run the selected report on a monthly basis.
- DELIVERY METHOD: Use to specify the email address to which the scheduled report will be sent.
  - EMAIL: Use to specify that the scheduled report will be sent to an email address.
  - EMAIL ADDRESS: Use to specify the email address to which the report will be sent.
- SAVE: Use to save the scheduling options for this report.
- DELETE: Use to delete the scheduling options for this report.

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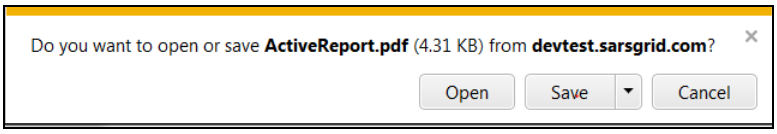
- CLOSE: Use to exit the Schedule report screen.

a. In the Report Schedule panel, click on RUN TIME ▼ and select the time of day for running the report. Then click on DAILY, WEEKLY or MONTHLY to specify the frequency.

b In the Delivery Method panel, click on Email if the scheduled report should be sent to an email address. Then click on Email Address and type in the address to which the report should be sent.

2. To view or print the report, click on PRINT. A Windows viewer screen will open and the following message will be displayed:



a. Click on OPEN to view the report on the screen. An option will be provided to print the report from that screen.

-or-

b. Click on SAVE ▼ and then click on SAVE, SAVE AS, or SAVE AND OPEN and follow the options provided.

Note
Sometimes the report viewer screen will be hidden behind the current window. Select the screen from the task bar to make it the active screen.

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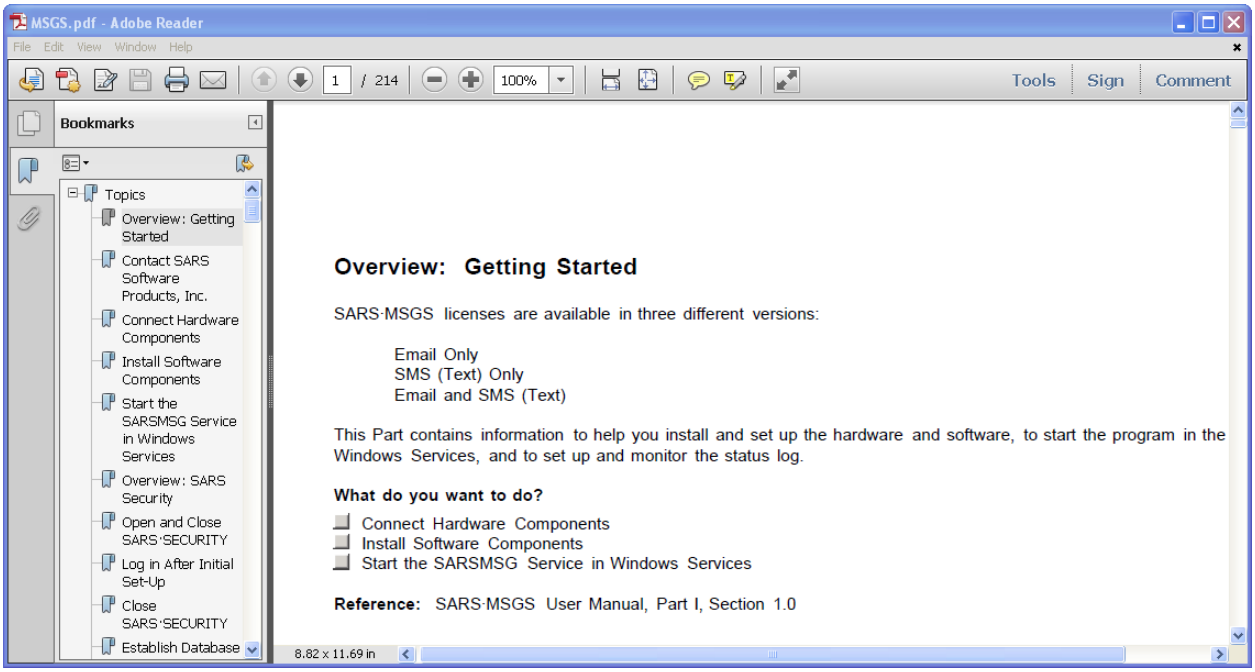
APPENDIX A — HELP FILE

The Help feature is a convenient and quick way to obtain more information about SARS Messages topics. There are four ways to use the Help feature: Contents, Index, Search, and Glossary.

▶Contents

1. Press **F1** from any SARS Messages screen to display the Help options. Here is an example:



2. Click on the CONTENTS tab to display books representing a table of contents.
3. Double-click on the book containing the topic of your choice. Other books may appear.
4. Continue to double-click on the desired book(s) until a list of topics is displayed.
5. Click on the desired topic to display the information in the right-hand pane.
6. Click on the **X** at the upper right of the screen to close the Help feature.

▶Index

1. Press **F1** from any SARS Messages screen to display the Help options.
2. Click on the INDEX tab to display an alphabetized comprehensive list of topics.
3. Scroll to find the topic or type the first few letters of the topic for which you are seeking information.
4. Click on the selected topic.

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5. Click on DISPLAY to view the desired information.

6. Click on the **X** at the upper right of the screen to close the Help feature.

▶Search

1. Press **F1** from any SARS Messages screen to display the Help options.

2. Click on the SEARCH tab.

3. Type the word for which you are seeking information. A list of all topics containing that word will be displayed.

4. Click on the selected topic.

5. Click on DISPLAY to view the desired information.

Tip To remove the highlight blocks from help search word hits, click on the REFRESH button at the top of the screen.

6. Click on the **X** in the upper right-hand corner to close the Help screen.

▶Glossary

1. Press **F1** from any SARS Messages screen to display the Help options.

2. Click on the GLOSSARY tab.

3. Click on the desired word to display its definition in the lower-pane

4. Click on the **X** in the upper right-hand corner to close the Help screen.

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APPENDIX B — GoToAssist

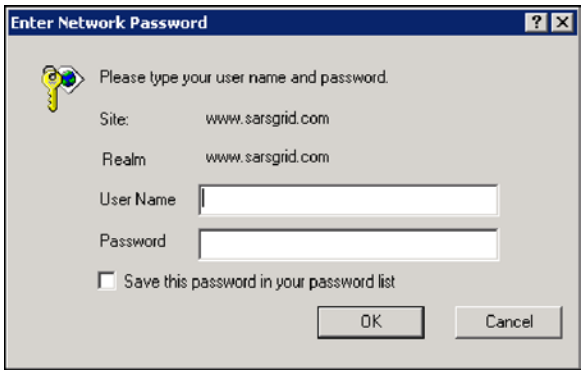
GoToAssist is the method used by SARS Software Products, Inc. to assist clients resolve system problems online. GoToAssist may be initiated only when the college logs onto www.sarsgrid.com and requests Product Support. You may stand by to observe the actions taken by our representative to resolve your problem.

1. First call SARS Software Products, Inc. at (415) 226-0040 to request assistance.

2. When instructed to do so, log onto the Internet using Internet Explorer, Netscape or Firefox.

3. Go to www.sarsgrid.com.

4. Click **Online Support** in the upper right-hand area of the screen. A screen will be displayed that looks like this:



5. You will be asked to enter a network user name and password. The user name and password are both in lower case.

6. After entering the User Name and Password, click **OK**.

7. In a few moments, a message will ask if something may be downloaded. This is a safe, virus-free program that will be placed in your temporary directory.

   a. [Internet Explorer] When prompted, click **Yes** to start the download. (If the download does not start, click **Click Here** to download the link on the web page. When prompted, select **Run** for its current location.)

   -or-

   b. [Netscape] When prompted, click **Grant** to start the download. You will be asked to do this twice.

   -or-

   c. [Firefox] Skip to step 8, below.

8. In a few moments, a program called Chat Link will pop up on the screen. Wait.

9. When you are asked permission for an agent to see your screen, make sure that anything you do not wish the SARS Software Products, Inc. agent to see on the screen is minimized or closed; then click **OK**.

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10. A representative from SARS Software Products, Inc. will now be able to view and work on your computer as if he were there. To prevent “mouse wars,” refrain from using the mouse until the support actions are completed. Be reassured that any time you wish to lock out our representative, all you have to do is move your mouse.

11. After you are advised that Customer Support has disconnected from your computer, close the web browser and log off the Internet.

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APPENDIX C — Database Schema

The database schemas are comprised of a list of tables and their associated fields (see following pages).

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#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: dbo_Tbl_MSGS_Application_Sched_Code_XRef						
1	Application_ID	Number, Long Integer	4		☑	No
2	Sched_Code_ID	Number, Long Integer	4		☑	No
3	Message_ID	Number, Long Integer	4		☐	No
Table: dbo_Tbl_MSGS_Application_Types						
1	Application_Type_ID	Number, Long Integer	4		☑	No
2	Description	Text	50		☐	No
Table: dbo_Tbl_MSGS_Application_User_XRef						
1	Application_ID	Number, Long Integer	4		☑	No
2	User_ID	Number, Long Integer	4		☑	No
Table: dbo_Tbl_MSGS_Applications						
1	Application_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Description	Text	255		☐	No
3	Contact_Option	Number, Long Integer	4		☐	No
4	Disabled	Yes/No	1		☐	No
5	On_Demand	Yes/No	1		☐	No
6	Start_Time	Date/Time	8		☐	No
7	Stop_Time	Date/Time	8		☐	No
8	Days_In_Advance	Number, Integer	2		☐	No
9	Saturday	Yes/No	1		☐	No
10	Sunday	Yes/No	1		☐	No
11	Reminder_Message_Enabled	Yes/No	1		☐	No
12	Reminder_Message_ID	Number, Long Integer	4		☐	No
13	Show_Message_Enabled	Yes/No	1		☐	No
14	Show_Message_ID	Number, Long Integer	4		☐	No
15	NoShow_Message_Enabled	Yes/No	1		☐	No
16	NoShow_Message_ID	Number, Long Integer	4		☐	No
17	Batch_Message_Enabled	Yes/No	1		☐	No
18	Batch_Message_ID	Number, Long Integer	4		☐	No
19	SARS_Integrated	Yes/No	1		☐	No
20	Database_ID	Number, Long Integer	4		☐	No
21	Location_ID	Number, Long Integer	4		☐	No
22	Auto_Cancel	Yes/No	1		☐	No
23	Batch_Creation_Time	Date/Time	8		☐	No
24	Group_Appointments	Yes/No	1		☐	No
25	Primary_Language_ID	Number, Long Integer	4		☐	No
26	SMTP_Server_ID	Number, Long Integer	4		☐	No
27	SMS_Server_ID	Number, Long Integer	4		☐	No
28	Batch_Priority_ID	Number, Long Integer	4		☐	No
29	Use_Contact_Email_Address	Yes/No	1		☐	No
30	SMS_Cancel_Response	Text	50		☐	No
31	SMS_Opt_Out_Response	Text	50		☐	No
Table: dbo_Tbl_MSGS_Appointment_Cancel_Tokens						
1	Appointment_Cancel_Token_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Batch_Detail_ID	Number, Long Integer	4		☐	No
3	Create_Date	Date/Time	8		☐	No
4	Appointment_Cancel_Token	Number, Replication ID	16		☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: dbo_Tbl_MSGS_Batch_Detail						
1	Application_ID	Number, Long Integer	4		☐	No
2	Batch_ID	Number, Long Integer	4		☐	No
3	Batch_Detail_ID	AutoNumber, Long Integer, Increment	4		☑	No
4	Sequence_Number	Number, Long Integer	4		☐	No
5	Database_ID	Number, Long Integer	4		☐	No
6	Student_ID	Number, Long Integer	4		☐	No
7	Alt_ID	Text	50		☐	No
8	Student_First_Name	Text	50		☐	No
9	Student_Middle_Name	Text	50		☐	No
10	Student_Last_Name	Text	50		☐	No
11	Student_Full_Name	Text	255		☐	No
12	Sched_ID	Number, Long Integer	4		☐	No
13	History_ID	Number, Long Integer	4		☐	No
14	Sched_Date	Date/Time	8		☐	No
15	Sched_Time	Date/Time	8		☐	No
16	Duration	Number, Integer	2		☐	No
17	Counselor_ID	Number, Long Integer	4		☐	No
18	Counselor_First_Name	Text	50		☐	No
19	Counselor_Middle_Name	Text	50		☐	No
20	Counselor_Last_Name	Text	50		☐	No
21	Counselor_Full_Name	Text	255		☐	No
22	Room_Number	Text	255		☐	No
23	Text_Phone	Text	50		☐	No
24	Email_Address	Text	255		☐	No
25	Status_ID	Number, Long Integer	4		☐	No
26	Message_ID	Number, Long Integer	4		☐	No
27	Cancel_Appt	Yes/No	1		☐	No
28	Completed	Yes/No	1		☐	No
29	Email_Sent	Yes/No	1		☐	No
30	Email_Status_ID	Number, Long Integer	4		☐	No
31	Email_Sent_Time	Date/Time	8		☐	No
32	SMS_Sent	Yes/No	1		☐	No
33	SMS_Status_ID	Number, Long Integer	4		☐	No
34	SMS_Sent_Time	Date/Time	8		☐	No
35	Contact_Option	Number, Integer	2		☐	No
36	Appt_Cancelled_In_SARS	Yes/No	1		☐	No
Table: dbo_Tbl_MSGS_Batch_Priorities						
1	Batch_Priority_ID	Number, Long Integer	4		☑	No
2	Description	Text	255		☐	No
Table: dbo_Tbl_MSGS_Batch_Sources						
1	Batch_Source_ID	Number, Long Integer	4		☑	No
2	Description	Text	255		☐	No
Table: dbo_Tbl_MSGS_Batch_Types						
1	Batch_Type_ID	Number, Long Integer	4		☑	No
2	Description	Text	255		☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: dbo_Tbl_MSGS_Batches						
1	Application_ID	Number, Long Integer	4		☐	No
2	Batch_ID	AutoNumber, Long Integer, Increment	4		☑	No
3	Description	Text	255		☐	No
4	Date_Created	Date/Time	8		☐	No
5	Start_Date_Time	Date/Time	8		☐	No
6	Stop_Date_Time	Date/Time	8		☐	No
7	Total_Entries	Number, Long Integer	4		☐	No
8	Enabled	Yes/No	1		☐	No
9	Batch_Priority_ID	Number, Long Integer	4		☐	No
10	Batch_Source_ID	Number, Long Integer	4		☐	No
11	Batch_Type_ID	Number, Long Integer	4		☐	No
12	Created_By_User_ID	Number, Long Integer	4		☐	No
Table: dbo_Tbl_MSGS_Change_Log						
1	Change_Log_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Record_Type_ID	Number, Long Integer	4		☐	No
3	Record_ID	Number, Long Integer	4		☐	No
4	Old_ID	Number, Long Integer	4		☐	No
5	Old_Value	Text	255		☐	No
6	New_ID	Number, Long Integer	4		☐	No
7	New_Value	Text	255		☐	No
8	User_ID	Number, Long Integer	4		☐	No
9	Change_Date	Date/Time	8		☐	No
10	Log_Message	Memo	0		☐	No
Table: dbo_Tbl_MSGS_Change_Log_Record_Types						
1	Change_Log_Record_Type_ID	Number, Long Integer	4		☑	No
2	Description	Text	50		☐	No
Table: dbo_Tbl_MSGS_Contact_Options						
1	Contact_Option_ID	Number, Long Integer	4		☑	No
2	Description	Text	255		☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: dbo_Tbl_MSGS_Control						
1	ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Run_Continuously	Yes/No	1		☐	No
3	Global_Start_Time	Date/Time	8		☐	No
4	Global_Stop_Time	Date/Time	8		☐	No
5	DB_Version	Text	50		☐	No
6	Sproc_Version	Text	50		☐	No
7	Licensed_User	Text	255		☐	No
8	License_Key	Text	255		☐	No
9	Batch_Check_Frequency	Number, Integer	2		☐	No
10	Hibernation_Check_Frequency	Number, Integer	2		☐	No
11	Log_Locations	Number, Byte	1		☐	No
12	Verbose_Logging	Yes/No	1		☐	No
13	Log_Truncation_Frequency	Number, Byte	1		☐	No
14	Archive_Text_Logs	Yes/No	1		☐	No
15	Truncate_Logs_On_Restart	Yes/No	1		☐	No
16	SMTP_Throttle_Processing	Yes/No	1		☐	No
17	SMTP_Group_Size	Number, Long Integer	4		☐	No
18	SMTP_Group_Delay	Number, Long Integer	4		☐	No
19	SMTP_Batch_Chunk_Size	Number, Long Integer	4		☐	No
20	Email_Cancel_Link_URL	Text	255		☐	No
21	Default_SMTP_Server_ID	Number, Long Integer	4		☐	No
22	Default_SMS_Server_ID	Number, Long Integer	4		☐	No
Table: dbo_Tbl_MSGS_Email_Templates						
1	Email_Template_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Application_ID	Number, Long Integer	4		☐	No
3	Message_Type_ID	Number, Long Integer	4		☐	No
4	Language_ID	Number, Long Integer	4		☐	No
5	Description	Text	255		☐	No
6	From_Name	Text	255		☐	No
7	From_Address	Text	255		☐	No
8	Reply_Address	Text	255		☐	No
9	Subject	Text	255		☐	No
10	Body	Memo	0		☐	No
11	Html_Body	Memo	0		☐	No
12	Cancel_Link_Prompt	Text	255		☐	No
13	Cancel_Link_Description	Text	255		☐	No
14	Opt_Out_Link_Prompt	Text	255		☐	No
15	Opt_Out_Link_Description	Text	255		☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: dbo_Tbl_MSGS_Errors						
1	ID	AutoNumber, Long Integer, Increment	4		☑	No
2	User_ID	Number, Long Integer	4		☐	No
3	Err_Date	Date/Time	8		☐	No
4	Err_Module	Text	255		☐	No
5	Err_File	Text	255		☐	No
6	Err_Number	Text	255		☐	No
7	Err_Function	Text	255		☐	No
8	Err_Line	Text	255		☐	No
9	Err_Build	Text	255		☐	No
10	Err_Message	Text	255		☐	No
11	Exception	Memo	0		☐	No
12	Batch_Detail_ID	Number, Long Integer	4		☐	No
Table: dbo_Tbl_MSGS_Import_Files						
1	Import_File_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Application_ID	Number, Long Integer	4		☐	Yes
3	Uploaded_By_User_ID	Number, Long Integer	4		☐	Yes
4	Description	Text	255		☐	Yes
5	Import_File_Name	Text	255		☐	No
6	Import_File_Path	Memo	0		☐	No
7	Field_Delimiter_Type	Number, Integer	2		☐	No
8	Field_Delimiter	Text	50		☐	No
9	Disregard_Rows_Beginning	Number, Integer	2		☐	No
10	Disregard_Rows_End	Number, Integer	2		☐	No
11	Date_Format	Text	50		☐	No
Table: dbo_Tbl_MSGS_Import_Statuses						
1	Import_Status_ID	Number, Long Integer	4		☑	No
2	Description	Text	255		☐	No
Table: dbo_Tbl_MSGS_Imports						
1	Import_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Application_ID	Number, Long Integer	4		☐	No
3	Created_By_User_ID	Number, Long Integer	4		☐	No
4	Description	Text	255		☐	No
5	Start_Date_Time	Date/Time	8		☐	No
6	Stop_Date_Time	Date/Time	8		☐	No
7	Message_ID	Number, Long Integer	4		☐	No
8	Import_File_ID	Number, Long Integer	4		☐	No
9	Enabled	Yes/No	1		☐	No
10	Import_Spec	Memo	0		☐	No
11	Scheduled	Yes/No	1		☐	No
12	Schedule	Memo	0		☐	No
13	Importing	Yes/No	1		☐	No
14	Last_Import_Date_Time	Date/Time	8		☐	No
15	Import_Status_ID	Number, Long Integer	4		☐	No
Table: dbo_Tbl_MSGS_Languages						
1	Language_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Description	Text	50		☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: dbo_Tbl_MSGS_Message_Types						
1	Message_Type_ID	Number, Long Integer	4		☑	No
2	Description	Text	255		☐	No
Table: dbo_Tbl_MSGS_Messages						
1	Message_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Application_ID	Number, Long Integer	4		☐	No
3	Language_ID	Number, Long Integer	4		☐	No
4	Message_Type_ID	Number, Long Integer	4		☐	No
5	Email_Template_ID	Number, Long Integer	4		☐	No
6	SMS_Template_ID	Number, Long Integer	4		☐	No
7	Description	Text	255		☐	No
8	Allow_Cancellation	Yes/No	1		☐	No
Table: dbo_Tbl_MSGS_Notify_Days						
1	Application_ID	Number, Long Integer	4		☑	No
2	Day_ID	Number, Integer	2		☑	No
3	Notify_Sunday	Yes/No	1		☐	No
4	Notify_Monday	Yes/No	1		☐	No
5	Notify_Tuesday	Yes/No	1		☐	No
6	Notify_Wednesday	Yes/No	1		☐	No
7	Notify_Thursday	Yes/No	1		☐	No
8	Notify_Friday	Yes/No	1		☐	No
9	Notify_Saturday	Yes/No	1		☐	No
Table: dbo_Tbl_MSGS_Service_Log						
1	ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Service_ID	Number, Long Integer	4		☐	No
3	Log_Date	Date/Time	8		☐	No
4	Batch_ID	Number, Long Integer	4		☐	No
5	Batch_Detail_ID	Number, Long Integer	4		☐	No
6	Description	Memo	0		☐	No
Table: dbo_Tbl_MSGS_SMS_Reply_Handling						
1	Text_Phone	Text	50		☑	No
2	Batch_Detail_ID	Number, Long Integer	4		☑	No
3	Send_Date	Date/Time	8		☐	No
4	Response_Received_Date	Date/Time	8		☐	No
5	Response_Received	Text	255		☐	No
6	Response_Handled	Yes/No	1		☐	No
7	Response_Type_ID	Number, Long Integer	4		☐	No
Table: dbo_Tbl_MSGS_SMS_Response_Types						
1	Response_Type_ID	Number, Long Integer	4		☑	No
2	Description	Text	255		☐	No
Table: dbo_Tbl_MSGS_SMS_Servers						
1	SMS_Server_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Description	Text	255		☐	No
3	Server	Text	255		☐	No
4	Login_Required	Yes/No	1		☐	No
5	Username	Text	255		☐	No
6	Password	Text	255		☐	No

#	Field Name	Data Type	Size	Description	Primary Key	Secondary Index
Table: dbo_Tbl_MSGS_SMS_Templates						
1	SMS_Template_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Application_ID	Number, Long Integer	4		☐	No
3	Message_Type_ID	Number, Long Integer	4		☐	No
4	Language_ID	Number, Long Integer	4		☐	No
5	Description	Text	255		☐	No
6	Body	Memo	0		☐	No
7	Responses_Prompt	Text	255		☐	No
8	Cancel_Response_Description	Text	255		☐	No
9	Opt_Out_Response_Description	Text	255		☐	No
Table: dbo_Tbl_MSGS_SMTP_Servers						
1	SMTP_Server_ID	AutoNumber, Long Integer, Increment	4		☑	No
2	Description	Text	255		☐	No
3	Send_Method	Number, Integer	2		☐	No
4	Server	Text	255		☐	No
5	Port	Number, Integer	2		☐	No
6	SSL	Yes/No	1		☐	No
7	Login_Required	Yes/No	1		☐	No
8	Username	Text	255		☐	No
9	Password	Text	255		☐	No
10	Throttle_Processing	Yes/No	1		☐	No
11	Group_Size	Number, Long Integer	4		☐	No
12	Group_Delay	Number, Long Integer	4		☐	No
Table: dbo_Tbl_MSGS_Statuses						
1	Status_ID	Number, Long Integer	4		☑	No
2	Description	Text	255		☐	No

Type: Linked ODBC

Table Name	# of Fields	Linked Table Name	System Table	Linked Exclusive	Linked Save PWD
dbo_Tbl_MSGS_Application_Sched_Code_XRef	3	dbo.Tbl_MSGS_Application_Sched_Code_XRef	☐	☐	☐
dbo_Tbl_MSGS_Application_Types	2	dbo.Tbl_MSGS_Application_Types	☐	☐	☐
dbo_Tbl_MSGS_Application_User_XRef	2	dbo.Tbl_MSGS_Application_User_XRef	☐	☐	☐
dbo_Tbl_MSGS_Applications	31	dbo.Tbl_MSGS_Applications	☐	☐	☐
dbo_Tbl_MSGS_Appointment_Cancel_Tokens	4	dbo.Tbl_MSGS_Appointment_Cancel_Tokens	☐	☐	☐
dbo_Tbl_MSGS_Batch_Detail	36	dbo.Tbl_MSGS_Batch_Detail	☐	☐	☐
dbo_Tbl_MSGS_Batch_Priorities	2	dbo.Tbl_MSGS_Batch_Priorities	☐	☐	☐
dbo_Tbl_MSGS_Batch_Sources	2	dbo.Tbl_MSGS_Batch_Sources	☐	☐	☐
dbo_Tbl_MSGS_Batch_Types	2	dbo.Tbl_MSGS_Batch_Types	☐	☐	☐
dbo_Tbl_MSGS_Batches	12	dbo.Tbl_MSGS_Batches	☐	☐	☐
dbo_Tbl_MSGS_Change_Log	10	dbo.Tbl_MSGS_Change_Log	☐	☐	☐
dbo_Tbl_MSGS_Change_Log_Record_Types	2	dbo.Tbl_MSGS_Change_Log_Record_Types	☐	☐	☐
dbo_Tbl_MSGS_Contact_Options	2	dbo.Tbl_MSGS_Contact_Options	☐	☐	☐
dbo_Tbl_MSGS_Control	22	dbo.Tbl_MSGS_Control	☐	☐	☐
dbo_Tbl_MSGS_Email_Templates	15	dbo.Tbl_MSGS_Email_Templates	☐	☐	☐
dbo_Tbl_MSGS_Errors	12	dbo.Tbl_MSGS_Errors	☐	☐	☐
dbo_Tbl_MSGS_Import_Files	11	dbo.Tbl_MSGS_Import_Files	☐	☐	☐
dbo_Tbl_MSGS_Import_Statuses	2	dbo.Tbl_MSGS_Import_Statuses	☐	☐	☐
dbo_Tbl_MSGS_Imports	15	dbo.Tbl_MSGS_Imports	☐	☐	☐
dbo_Tbl_MSGS_Languages	2	dbo.Tbl_MSGS_Languages	☐	☐	☐
dbo_Tbl_MSGS_Message_Types	2	dbo.Tbl_MSGS_Message_Types	☐	☐	☐
dbo_Tbl_MSGS_Messages	8	dbo.Tbl_MSGS_Messages	☐	☐	☐
dbo_Tbl_MSGS_Notify_Days	9	dbo.Tbl_MSGS_Notify_Days	☐	☐	☐
dbo_Tbl_MSGS_Service_Log	6	dbo.Tbl_MSGS_Service_Log	☐	☐	☐
dbo_Tbl_MSGS_SMS_Reply_Handling	7	dbo.Tbl_MSGS_SMS_Reply_Handling	☐	☐	☐
dbo_Tbl_MSGS_SMS_Response_Types	2	dbo.Tbl_MSGS_SMS_Response_Types	☐	☐	☐
dbo_Tbl_MSGS_SMS_Servers	6	dbo.Tbl_MSGS_SMS_Servers	☐	☐	☐
dbo_Tbl_MSGS_SMS_Templates	9	dbo.Tbl_MSGS_SMS_Templates	☐	☐	☐
dbo_Tbl_MSGS_SMTP_Servers	12	dbo.Tbl_MSGS_SMTP_Servers	☐	☐	☐
dbo_Tbl_MSGS_Statuses	2	dbo.Tbl_MSGS_Statuses	☐	☐	☐