Manual:

Auto-Attendance with Connect 5!

For K-12 schools

Blackboard
connect))

Attendance Automation

SF Doc ID: A-0799

About this Manual

This manual will show you how to set up your Connect 5 system and a general automation script to pull data from your SIS and automatically send Attendance Messages to your Recipients.

The instructions provided are for WINDOWS systems only and provide a general solution for attendance automation.

If you're platform is Mac or Unix, contact client care or open a case online.

This manual contains active links that intended to be read on a computer or portable device. Printing this manual will remove all active links.

[To download the latest version of this manual, click here.](#)

How Auto-Attendance Works

Blackboard Connect offers a general Windows automation script that takes your Recipient information from a .csv import file and automatically send your data to Blackboard Connect 5.

Once Connect 5 receives the attendance data from your SIS, it will use a specified, pre-written, attendance template you have saved in your Blackboard Connect 5 account. Connect 5 will add your Recipients and send your message to your Recipients.

To provide Recipient specific information, you will use variables and flex-fields that match the headers in your import file. Using these headers and variables, Connect 5 will be able to insert information such as absent dates, periods, and other information that will vary from Recipient to Recipient.

The basic process is outlined below.

1. Save a Connect 5 template and provide your message text with flex-fields.
2. Create a .csv Import File.
3. Download and update an auto-script.
4. Run your auto-script.

This manual will discuss how to set your system up to send automated attendance messages and how to make minor changes to the automation script.
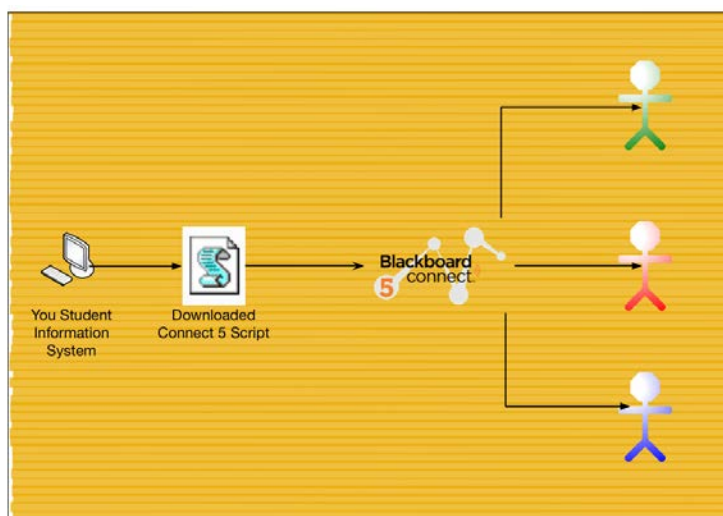
Setting up School-Level Auto-Attendance Messages

Before you can start sending attendance messages, you will first need to:

➢ Create a Message Template. You will need a different template for each type of attendance message (absent, tardy, etc) you would like to automate.
➢ Provide message text with variables and flex-fields that will match the headers in your .csv file.
➢ Prepare a .csv file with headers that match your flex-fields.

This section will walk you through the process of creating the required tools you need to automate your attendance messages.

Creating a Message Template

You can create a Message Template by going to the Message Center and clicking **Templates** on the left side of the screen.
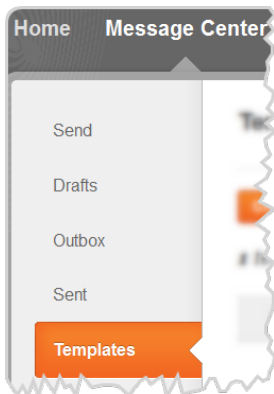
1. Click Message Center at the top of the page and select Templates on the left side of the window.

2. Click the **Create New Template** button.

3. Provide a template name in the given field.

4. Select a Template type (Shared, private, etc).*

5. Choose a message type for your Template (Emergency, outreach, etc).

6. Type in the title of your message.

Using Variables in your Message Text

NOTE: Make sure that when sending messages using specific delivery modes that all Recipients you have included in your data file has a working phone number, email address, etc.

5. Create an Outreach message and provide a Title in the **Title field**.

6. For Phone Messages: Click the **Phone Tab** under Delivery Mode and click the **Add Text (1/2)** button.

7. Insert your script in the given text box and place your variables in brackets [] in the message where you want your information to be played. Make sure your Variables have no spaces and match the headers in your .csv file exactly. An example is below:

> *Hello this is [SITE_NAME] calling to notify you that [FIRST_NAME] was marked absent during period [Period] on [DELIVERY_DATE]. Please call the attendance office at 123-456-7890 to excuse your students' absence. Thank you and have a great day!*

When delivered, the message will be heard by one Recipient as follows:

> **Hello this is Blackboard University calling to notify you that William was marked absent during period 4 on 2/15/12. Please call the attendance office at 123-456-7890 to excuse your students' absence. Thank you and have a great day!**

Connect 5 will replace your Variables that you have provided in brackets [] with the information under the same header in your Data file.

The SITE_NAME and DELIVERY_DATE will be pulled from the Connect 5 system.
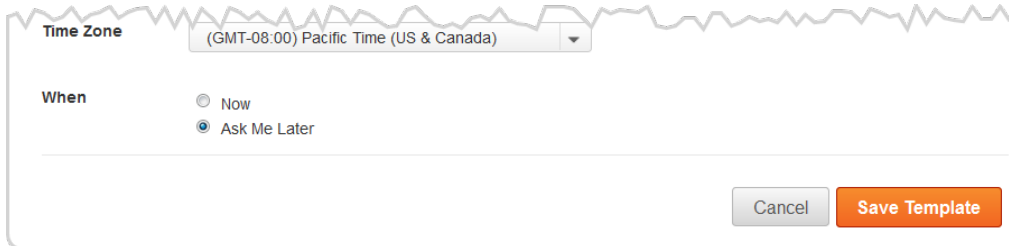

Also note that we've included a Contacttype header to designate all the contacts (provided by their Reference Code) as students. This is recommended as it will skip a step when updating the automation script (explained later in this manual).

8. If you would like to create additional delivery modes, click another delivery mode tab (email, SMS, etc) and use the copy from pull down menu to copy over your text script you provided in your TTS phone field.
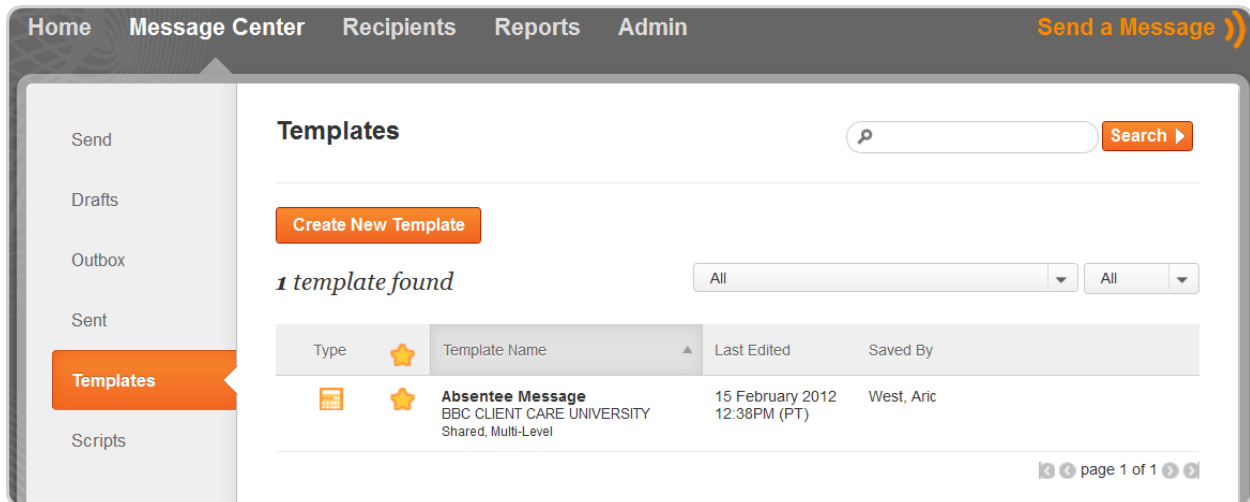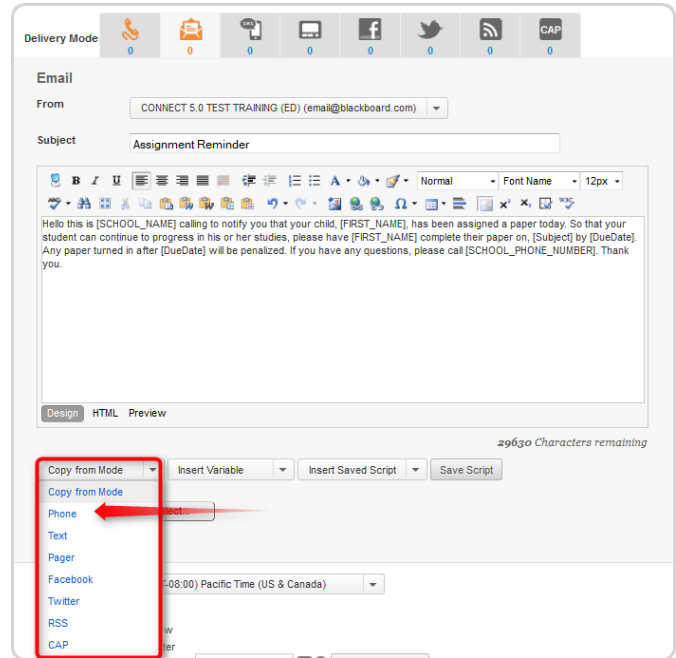
Saving your Template

9. Under scheduling the message, select **Ask Me Later** to save your template without sending your message.

Time Zone	(GMT-08:00) Pacific Time (US & Canada) ▾
When	○ Now
	⦿ Ask Me Later

Cancel   **Save Template**

10. Click **Save Template** .

Your Template will be saved under the Templates tab in the Message Center.

| Home | Message Center | Recipients | Reports | Admin | Send a Message ⟩⟩ |

Templates   🔍 [   ] **Search ▶**

| Send |
| Drafts |
| Outbox |
| Sent |
| **Templates** |
| Scripts |

Create New Template

1 template found   All ▾   All ▾

| Type	⭐	Template Name ▲	Last Edited	Saved By
📅	⭐	**Absentee Message** BBC CLIENT CARE UNIVERSITY Shared, Multi-Level	15 February 2012 12:38PM (PT)	West, Aric

◁ ◁ page 1 of 1 ▷ ▷

Prepare a .csv data import file

You will now need to create a .csv import file with a list of your students and the correct headers required for Connect 5 and your customized flex-fields.

1. Open Microsoft Excel or another spread sheet application.

2. Type **Institution** and **ReferenceCode** along with your additional headers. The Institution header will tell Connect 5 which school or institution the Recipients belong to while the ReferenceCode (usually used as a staff or student ID number) will specify the Recipient's name.

Note that standard variables such as **SCHOOL_NAME**, **FIRST_NAME**, and **SCHOOL_PHONE_NUMBER** do not need to be included in your file unless you want to use this information in your message. You can view all the standard variables available by clicking the "Insert Variable" drop down at the bottom of the Text to Speech box.
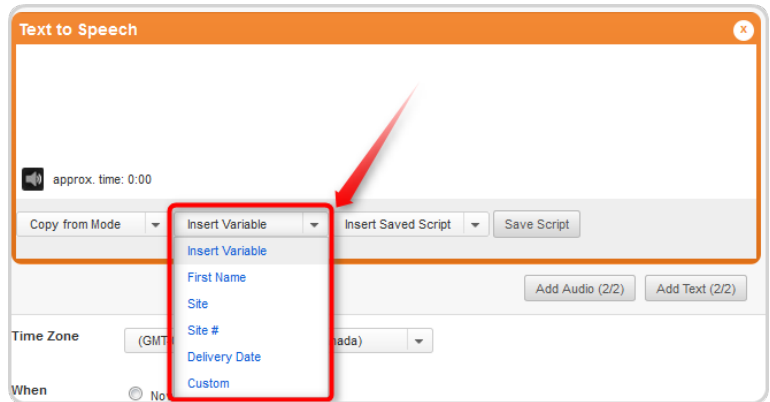
For this example, we want to include the contact type, Reference Code, the status, and the period the student was absent. Variables can have any header you would like, just as long as it has no spaces and the custom variable in the text of your message matches the header in the CSV.

For example, the header *period* would have to be changed to **Period (with a capital)** to match the variable you will place in your message with brackets [Period]. These headers and placeholders ARE case-sensitive so please be accurate with your capitalized letters.

Contacttype	ReferenceCode	Period	Status
Student	555555555	4	Saturday School
Student	444444444	2	Detention

Remember when using your own customized Variables, they must match the headers you have created in your .csv file. Typos and incorrect capitalizations will prevent Connect 5 from finding the appropriate information in your data file and the information will be omitted from the message!

Customize your Automation Script

Download an Automation Script

Download an automation script by clicking one of the links below.

Connect 5 Auto Notification Script

Connect 5 Multi-Absent Upload Script

Open your Script

When you open the script you will see a lot of scripting code. You will not be modifying any of this code. Instead, you will simply be

1. Double-click the .txt file to open the script in Notepad.

2. Add your Connect 5 username and password to the script. This tells the script which Connect 5 account to send the attendance data.

Add your username and password to the script

Type your username and password to the auto-script.

3. Locate **strUserName = "myusername"** and replace *myusername* with the username that you use to log into your Connect 5 account. DO NOT DELETE THE QUOTATION MARKS "".

4. Provide your Connect 5 password in the same manor for the strUserPass = "mypassword" string located directly below the strUserName field (see below).

Specify Message Details

Provide the title of the template you want to use, specify the contact types, designate the delivery time and set the time zone.

5. Find **strMessageTitle = "Multi Absences"** in the block of text below the user name and password strings.

   In these quotation marks, you will need to type the name of the Connect 5 Template you want to use. Type the name exactly as it appears in Connect 5, including spaces and capitalizations.

6. Find **strMessageType = "All"** below the message title and specify the contact type (student) in this field.

7. Find **strUserTime** below the Contact Type string. Using the same time format as provided in the script, type the time you want to send your message and update the AM/PM.

   Remember to leave the quotation marks!

```
Set Message Title and Delivery Time
Dim strMessageTitle, strContactType, strUserTime, strUserZone
strMessageTitle = "Absentee Message"        'Template Name
strContactType  = "ALL"                     'Set to ALL if ContactType included in input file
strUserTime     = "05:05:00 PM"
strUserZone     = "PT"                       'HA, AK, PT, MT, CT, ET, AT
```

8. Find **strUserZone =** in the block of text below the User Time string.

```
Set Message Title and Delivery Time
Dim strMessageTitle, strContactType, strUserTime, strUserZone
strMessageTitle = "Absentee Message"        'Template Name
strContactType  = "ALL"                     'Set to ALL if ContactType i...
strUserTime     = "05:05:00 PM"
strUserZone     = "PT"                       'HA, AK, PT, MT, CT, ET, AT
```

   Type the following 2 character (all caps) time zone code:

   ➢ **HA**: Hawaii Time (GMT-10)
   ➢ **AK**: Alaska Time (GMT-10)
   ➢ **PT**: Pacific Time (GMT-8)
   ➢ **MT**: Mountain Time (GMT-7)
   ➢ **CT**: Central Time (GMT-6)
   ➢ **ET**: Eastern Time (GMT-5)
   ➢ **AT**: Atlantic Time (GMT-4)

Name your files

The last step you need before your finished with editing your script will to be name your output files and provide the name of your data file so your script knows what file to pull your data from.

In most cases, you may not need to provide names for your input and output file (see steps 10-12 below). If you would like to manually rename these files after the script has run, simply skip step 10 below.

However, providing the name of your .csv file is required. It does not matter what your file is called as long as the name of your .csv file is exactly typed inside the quotation marks next to **input file**.

9. Find the **inputFile** filed and type (or copy and paste) the name of your .csv data file inside the quotation marks "", replacing the default text (if applicable).

    Make sure to keep the **.csv file** extension or the script will fail to identify your data file.

    ```
    'Names of the files to utilize
    Dim inputFile, uploadFile, outputFile
    inputFile  = "MultiAbsence Students_1.csv"
    uploadFile = "MultiAbsence_Upload.txt"
    outputFile = "MultiAbsence_Output.txt"
    ```

You can skip the next step if the default name for these files are sufficient.

10. Find **uploadFile** and the **optputFile** strings and provide a name for the .txt files that will be exported after the script has run. These files can be named to whatever you want but are limited to Microsoft's Windows file limitations (no /, <,>, |, etc).

    ```
    'Names of the files to utilize
    Dim inputFile, uploadFile, outputFile
    inputFile  = "MultiAbsence Students_1.csv"
    uploadFile = "MultiAbsence_Upload.txt"
    outputFile = "MultiAbsence_Output.txt"
    ```
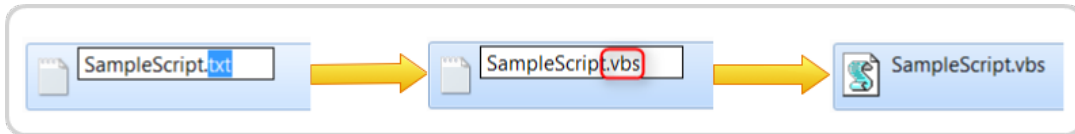
    Remember to leave the quotation marks and keep the .txt file extension at the end of the file name.

Save and Rename your Script

Once you have finished making your changes to the script, simply save and close the Notepad file.

11. Right-click on the file and select rename from the context menu.

12. Highlight the .txt file extension and type **.vbs.**

13. Click **Yes** when Windows asks you if you're sure you want to change the file extension.

Run your script and send your messages

Before running your script, make sure that your .csv data file and your updated attendance script is located in the same folder.
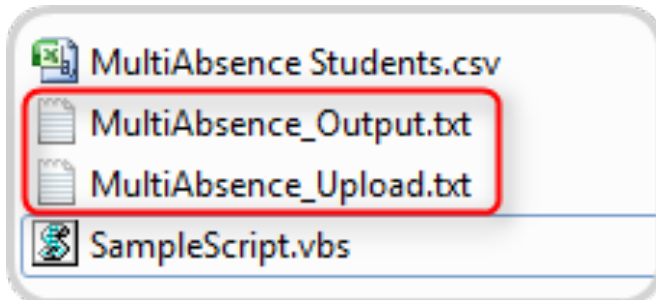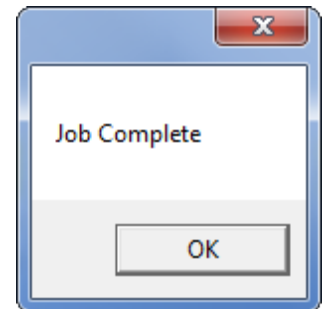
1. **Double-click** the .vbs scrip to start the script.

2. A pop-up window will appear. Click **OK**.

Creating Upload File

OK
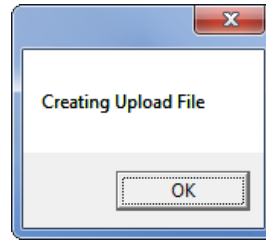
3. The script will ask you if you are ready to begin. If you would like to run your script at this time, click **Yes.** To cancel, click no.

Upload

Ready to upload.

Begin?

Yes   No
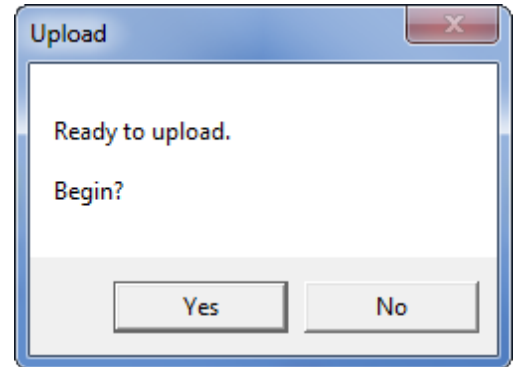
Click OK for each of the remaining screens. When the script is done, you will see the upload and output file in the same folder you launched your script.

Job Complete

OK

MultiAbsence Students.csv
MultiAbsence_Output.txt
MultiAbsence_Upload.txt
SampleScript.vbs

District-Level Auto-Attendance Messages

Creating a Linked Template

You can create a Message Template by going to the Message Center and clicking **Templates** on the left side of the screen.
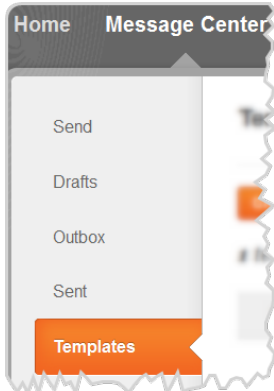
1.   Click Message Center at the top of the page and select Templates on the left side of the window.

2.   Click the **Create New Template** button.

3.   Provide a template name in the given field.

4.   Select the Linked Template Option.

5.   Choose a message type for your Template (Emergency, outreach, etc).

6.   Type in the title of your message.

Using Variables in your Message Text

NOTE: Make sure that when sending messages using specific delivery modes that all Recipients you have included in your data file has a working phone number, email address, etc.

9. Create an Outreach message and provide a Title in the **Title field**.

10. For Phone Messages: Click the **Phone Tab** under Delivery Mode and click the Add Text (1/2) button.

11. Insert your script in the given text box and place your variables in brackets [] in the message where you want your information to be played. Make sure your Variables have no spaces and match the headers in your .csv file exactly. An example is below:

> *Hello this is [SITE_NAME] calling to notify you that [FIRST_NAME] was marked absent during period [Period] on [DELIVERY_DATE]. Please call the attendance office at 123-456-7890 to excuse your students' absence. Thank you and have a great day!*

When delivered, the message will be heard by one Recipient as follows:

> **Hello this is Blackboard University calling to notify you that William was marked absent during period 4 on 2/15/12. Please call the attendance office at 123-456-7890 to excuse your students' absence. Thank you and have a great day!**

Connect 5 will replace your Variables that you have provided in brackets [] with the information under the same header in your Data file.

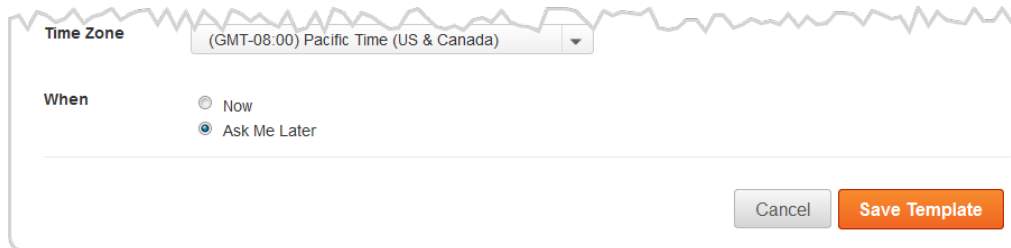The SITE_NAME and DELIVERY_DATE will be pulled from the Connect 5 system.

Also note that we've included a Contacttype header to designate all the contacts (provided by their Reference Code) as students. This is recommended as it will skip a step when updating the automation script (explained later in this manual).

12. If you would like to create additional delivery modes, click another delivery mode tab (email, SMS, etc) and use the copy from pull down menu to copy over your text script you provided in your TTS phone field.
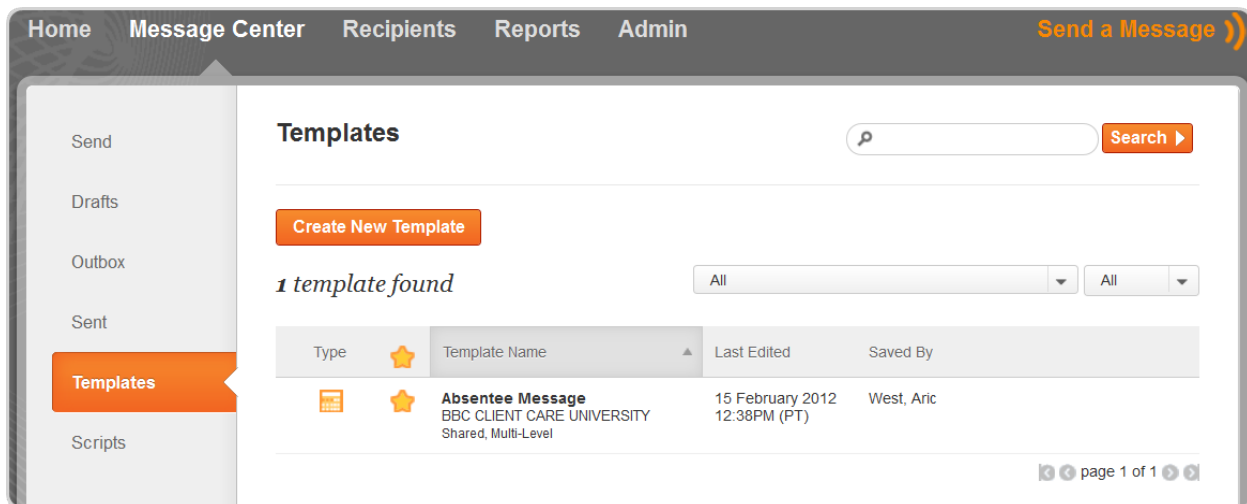
SF Doc ID: A-0799
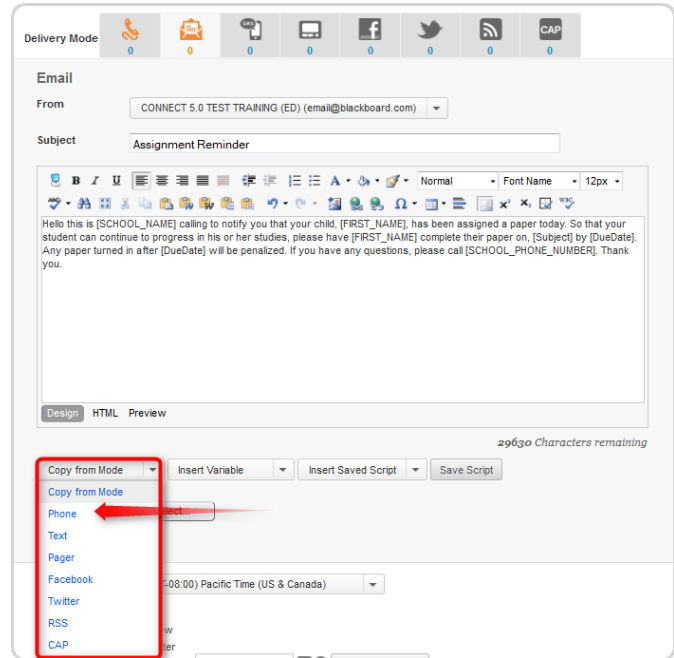
Saving your Template

11. Under scheduling the message, select **Ask Me Later** to save your template without sending your message.

12. Click [Save Template].

Your Template will be saved under the Templates tab in the Message Center.

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Appendix

Types of Templates

Multi-Level (ML) Template

A multi-Level template is a template created by higher level institutions and can be distributed to lower institutions as a standardized messages. This option is ideal for cities, government, or schools who need to enable their lower institutions to send formal and vetted messages (emergencies, press releases, etc).

Descendant institutions can access any of your Multi-Level templates under Templates tab in the Message Center.

Linked Template

Linked Templates are similar to multi-level templates. These templates can be created by superior level institutions and distributed to descendant institutions but will remain "linked" for message initiation and reporting purposes. This template is ideal for sending standardized attendance, tardy notices or lunch balance notifications.

Superior level institutions can initiate these scripts manually or by using an auto-script (contact Client Care for more information on using Auto scripts).

Descendant sites can edit linked templates, but with limited options. They can only edit the message title, the scripts or audio of the language/mode messages.

Private Template

Private Templates are created by an individual user and only the creator can see the template to send it. These templates are not shared with anyone and cannot be multi-level or linked.

Shared Templates

Standard Templates are created by an individual user but can be used/seen by other users**.** These templates are shared, meaning they are viewable by users at the same site at which it was created.