# Mongoose User Guide and Best Practices

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#### **General Information**

- Mongoose Cadence Website: https://sms.mongooseresearch.com/#/login
- Login Information: Loyola Gmail account and preferred password
   Note: You can reset your password if forgotten

## How to Send an Individual Text Message

If you would like to check in with a student, provide a specific student with some helpful information, or follow up with a student about a question/ inquiry, it may be helpful to send an individual/personalized text message to that student.

To send an individual text message, click the **"Compose"** button in the top left corner of the screen.

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Contacts	Sent Message		
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Reports	8 Send as assigned user (i)	5-30 min	
		1-2 hrs	
		2-6 hrs	
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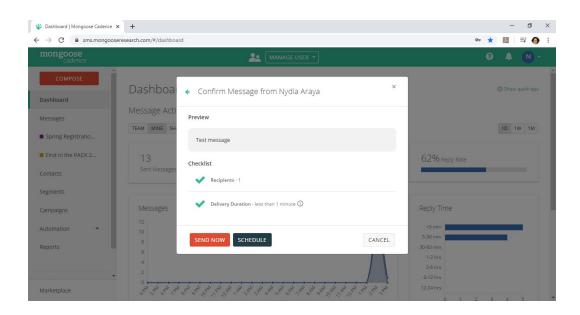
Within the **"Send to Contacts"** tab search for the student you wish to contact. You can find the student by searching by First Name, Last Name, Campus Wide ID, or Mobile Number. If you cannot find the student but have the student Mobile Number, you can manually enter the Mobile Number and compose a message to the student. Then, click **"NEXT."** 

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Segments Campaigns Automation	Messages Delivery Duration - less than 1 minute ()	Reply Time
Reports	SEND NOW SCHEDULE CANCEL	5-30 min 30-60 min 1-2 hrs
* Marketplace		2-6 hrs 6-12 hrs 12-24 hrs 0 1 2 3 4 5

You can select to **"Send Now"** or select **"Schedule"** to have the Mongoose Cadence system send the text message at a preferred time or date.

## <u>How to Create a Segment, Track As A Campaign, Send a Group Text</u> <u>Message, and Schedule a Message</u>

Segments can be used to send text messages to an identified group of students on a consistent basis. For example, if you would like to send text messages to your advisees about early warnings, mid term grades, registration, etc., you could message students through the segment easily. You would not have to gather contact information for each student each time you need to send a text message.



Click the **Segments** tab on the left side and it should bring you to this page. Then click the **NEW SEGMENTS** blue button.

After clicking **NEW SEGMENTS**, it should bring you to this page. Next, click the small green tab "**Enter Contact IDs or Mobile Numbers**"

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COMPOSE Dashboard	Segments NEW	/ SEGMENT				Show quick tips
Messages	Filter by: Marlea Louviere	✓ Active ✓		Q Sear	ch	
Contacts	NAME	TYPE	OWNER	CREATED	LAST USED	
Segments	Full Roster	Static	Marlea Louviere	2/20/20		1
Campaigns	Green Group!	Static	Marlea Louviere	2/14/20		:
Automation -	ORANGE	Static	Marlea Louviere	2/13/20	2/13/20	1
	RED outreach	Static	Marlea Louviere	2/13/20	2/13/20	8
Student Success / Adv 👻	Spring 2020 1st outreach	Static	Marlea Louviere	1/21/20	1/21/20	-
Organization •						
Marketplace	4 1 of 1					1-5

COMPOSE Dashboard	New Segment	
Messages	Name	
Contacts		Help Some things you should know:
Segments	Identifier Type	Contacts must be imported by an
Campaigns Automation Reports	Mobile Number         Contact ID           Contact Records (Comma/Tab Separated)         .           1000 recipients can be added at a time         .           • Contact IDs can be entered one per line or comma separated         .           • No extra fields should be entered into the text box         .	<ul> <li>Contacts must be imposed of an include them in a list</li> <li>Numbers can include dashes and/or parentheses</li> <li>To improve deliverability, messages are throttied per outgoing number (500 messages sent from a single number will take roughly 90 minutes)</li> </ul>
Student Success / Adv 👻		
Organization 👻		
Marketplace	CREATE CANCEL	

Title your group name under **Name**, switch **Identifier Type** to **Contact ID**. Then copy and paste the students campus wide ID numbers you want to include in this group.

COMPOSE Dashboard	New Segment	
Messages	Enter Contact IDs or Mobile Numbers »	
Contacts	Contacts meet ALL \$ of the following conditions:	Help Some things you should know:
Segments	First Name 💠 Equals 🗘	Contacts must be imported by an
Campaigns	+ ADD	Administrator before you can include them in a list
Automation 👻 Reports	PREVIEW CANCEL	<ul> <li>To improve deliverability, messages are throttled per outgoing number (500 messages sent from a single number will take roughly 90 minutes)</li> </ul>
Student Success / Adv 👻		
Organization 👻		

After pasting the student Campus Wide IDs, click **CREATE**. It may notify you that errors have occurred. If this occurs, download the errors spreadsheet and review the error details. Student contact information should be imported by your department administrator, but some students could be missing from the database. **Follow up with your department administrator about any errors.** 

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Messages	Filter by: Marlea Louviere	<ul> <li>Active</li> </ul>			Q Search		
Contacts	NAME	TYPE	OWNER	CREATED	LAST USED		
Segments	Full Roster	Static	Marlea Louviere	2/20/20			1
Campaigns	Green Group!	Static	Marlea Louviere	2/14/20			:
Automation •	Mardi Gras Outreach	Static	Marlea Louviere	2/20/20			1
	ORANGE	Static	Marlea Louviere	2/13/20	2/13/20		1
Student Success / Adv 👻	RED outreach	Static	Marlea Louviere	2/13/20	2/13/20		:
Organization -	Spring 2020 1st outreach	Static	Marlea Louviere	1/21/20	1/21/20		:
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You should then see the group of students you created. On the fair right side, click the vertical ellipsis button.

A tab with multiple options will pop up, click **Message**.

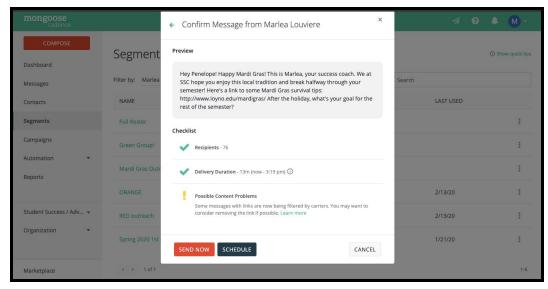
mongoose cadence		Compose Message from Marlea Louviere		1	0	M *
COMPOSE	Cogmont	Contacts Send to Segments				
Dashboard	Segment					
Messages	Filter by: Marlea	To Mardi Gras Outreach (Static) × Search by Segment Name	Search			
Contacts	NAME	Message		LAST USED		
Segments	Full Roster	Hey <first name="">! Happy Mardi Gras! This is Marlea, your success coach. We at SSC hope you enjoy this local tradition and break halfway through your</first>				1
Campaigns	Green Group!	semester! Here's a link to some Mardi Gras survival tips: http://www.loyno.edu/mardigras/ After the holiday, what's your goal for the rest of the semester?				:
Automation •	Mardi Gras Outr	FIELD 😳 📷				:
Reports	ORANGE	Sorry, bub. You will need to find a way to be more concise.		2/13/20		:
Student Success / Adv 👻	RED outreach	Track as Campaign ③ Send to my assigned contacts only ④		2/13/20		:
Organization 🔹	Spring 2020 1st	Send as assigned user ①		1/21/20		:
		NEXT				
Marketplace	∢ ▶ 1 of 1					1-6

Then type in a message, utilizing the **Field** button, emojis, or a picture for additional features. Above is an example about Mardi Gras safety tips that was sent to first year students.

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Spring Registratio	Message	
First in the PACK 2	8 TEST MESSAGE 50% Reply R	late
Contacts	Sent Message	
Segments	Track as Campaign ① Name ADD CAMPAIGN	
Campaigns	Messages Send to my assigned contacts only ①	
Automation 👻	6 Send as assigned user () <5 min	
Reports	3 4 30-60 min	_
	2 CANCEL 1-2 hrs	
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Marketplace		1 2 3

Make sure that you select "Track as a Campaign," name the campaign, and select the "add campaign" button. This will allow you to later review a report that includes the number of received messages, the number of replies, and other important information

that may be useful data information when tracking outreach/ communication with students. Then click, **NEXT.** 



A **Preview** will pop up, to confirm this is what you want to send. You can press the back arrow to edit, **SEND NOW**, or **SCHEDULE** when you'd like to send. The Checklist will inform you of the recipients, delivery duration, and any problems. After sending, schedule a window of time to respond to messages.

## How to Review a Campaign Report for Data Management

A campaign report gathers important data when initiating outreach with a group of students. A report allows you to see how many students received the text message, the percent of replies to the text message, student reply time and other important data. This data can be useful when tracking student outreach, communications and trends within your department.

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Spring Registratio	NAME	OWNER	CREATED	
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Contacts	Coffe and Donuts	Nydia Araya	2/03/20	1
Segments	Coffee and Donuts	Nydia Araya	2/21/20	1
Campaigns				
Automation 👻	Fall 2020 registration	Nydia Araya	3/14/20	1
Reports	Fall Registration 2020	Nydia Araya	3/10/20	:
	Introduction	Nydia Araya	1/24/20	:

In the "Campaigns" tab, find the campaign for which you would like to view the report. On the fair right side, click the vertical ellipsis button.

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	Campaigns NEW CAMP			<ul> <li>Show quick</li> </ul>
Messages	Filter by: Nydia Araya 🝷 Active	*	Q Search	
Spring Registratio	NAME	OWNER	CREATED	
First in the PACK 2	Checking in	Nydia Araya	2/14/20	View Report
Contacts	Coffe and Donuts	Nydia Araya	2/03/20	Edit
Segments	Coffee and Donuts	Nydia Araya	2/21/20	Message
Campaigns				
Automation 👻	Fall 2020 registration	Nydia Araya	3/14/20	Archive
teports	Fall Registration 2020	Nydia Araya	3/10/20	Delete
	Introduction	Nydia Araya	1/24/20	:

Then, click "view report." A report will generate that includes all data information. If you would like to export this data, you can click the "export" button on the top right of the screen. A .csv file will then automatically download

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nongoose cadence			MANAGE USER		• • •
COMPOSE	<ul> <li>Checking In</li> </ul>				EXPO
ashboard					Help me understand this repo
lessages	23	7 (30%)	7	0.3	Status - Active
Spring Registratio	Reached	Replied	Replies	Avg. Replies	Created - 2/14/20, 10:44am
First in the PACK 2	Messages				Contact Reply Time
ontacts	iviessages				Contact Reply Time
gments	25				<5 min 28.57% 5-30 min 28.57% 30-60 min 14.29%
impaigns	20				1-2 hrs 0% 2-6 hrs 28.57%
itomation 👻	15				6-12 hrs 096 12+ hrs 096 0 1 2 3
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#### **Best Practices**

- Text messages should be sent to supplement information that will be provided via email, office hours, appointments, etc. **Text messages should NOT be sent in place of these forms of communications.** For example, a text message can be sent to remind students to register for classes, but an email should follow that includes important information about how to register classes and important deadlines
- Limit text messages to 160 characters or less
- Send intentional, impactful, approachable and engaging text messages
- Always clarify your position or role within the university in the text message in order to maintain professionalism within the text message conversation
- Send text messages at appropriate times of day (Monday-Friday during university operational hours)
- **DO NOT** send confidential information to students in a text message. Follow up through email or scheduled appointment to provide this information.
- Student replies will be sent to your Loyola Gmail account. You will need to login to Mongoose to reply, but it is encouraged to create a Mongoose

label within your Gmail inbox so that your email does not become flooded with replies

#### How to Import Contact Information (If applicable with user access)

If you have owner or administrator access within Mongoose Cadence, you will be able to import student contact information for your department. In order to do this, you will need to create a .csv file that includes the following information for each student: Student ID, First Name, Last Name, Mobile Number, and Advisor

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## • Additional Tips:

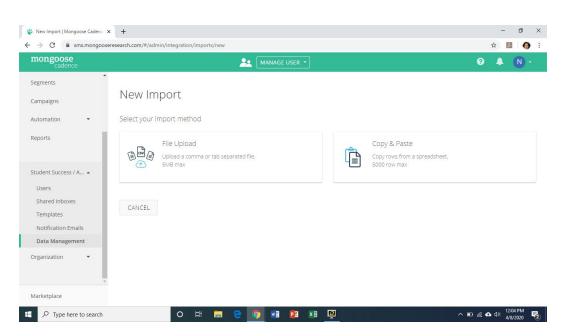
- Spreadsheet must be created in the EXACT format displayed above and saved as a .csv file
- Default the advisor to your department name for easy import
- Do not include an dashes or brackets in the mobile number

Upon import, Mongoose may indicate errors and prompt a spreadsheet of these errors for your review. Please download this file and review the errors. If 90% of the student contacts were successfully imported, then this is sufficient. Otherwise, you may want to review your imported spreadsheet, make adjustments and import again. If you need assistance, contact Liz Rainey or Nydia Araya.

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Users				
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Notification Emails	12		<5 min	
Data Management	10		5-30 min	
organization 👻	8		30-60 min	
0	4		1-2 hrs	
v	2	[a	2-6 hrs	
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On your dashboard locate the name of your department team on Mongoose Cadence and click the drop down arrow. Then, select **"Data Management."** 

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Segments *	Data N		t MESSAGE TYPE:	S NUMBER VALIDATION	MOBILE NUMBER UPDATE			
Reports		RT						③ Show quick tip:
Student Success / A +	Import L	og						
	ID	USER	STATUS	STARTED	COMPLETED	TOTAL	SUCCESS	ERROR
Users Shared Inboxes Templates Notification Emails	622662	Elizabeth Rainey	Complete	3/26/20, 4:08pm CDT	3/26/20, 4:09pm CDT	2728	484	2244
Data Management								



Once in Data Management, select the "new import" button in the top left corner.

Select "File Upload" as the import method.

mongoose cadence			8	N -
▲ iegments				
	New Import			
Campaigns	Upload	Preview	Import	
Automation 👻	•	Download a file template containing country for all fields or only required fields.		
		Comma-separated and tab-separated files are supported: up to 5MB.		
eports				 
tudent Success / A 🔺				
Users		() () () () () () () () () () () () () (		
Shared Inboxes				
Templates		Drag & drop		1
Notification Emails		your file here, or browse		
		.csv, .txt, up to 5MB		
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	Allow Mobile Number Update	e		
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Drag and drop the .csv file that includes the student contact information. Only select the "Allow Mobile Number Updates" checkbox if you are completing a

routine update to contact information data within your Mongoose Cadence department team. The upload should take a few minutes to complete. Mongoose Cadence will notify you when complete or notify you of any errors.

#### **Additional Resources**

- Mongoose Cadence Customer Service
  - Mike Kochczynski
     Email: <u>mike@mongooseresearch.com</u>
     Phone: (716) 228-4780
- Mongoose Cadence Academic Affairs Troubleshooting
  - Elizabeth Rainey Email: <u>earainey@loyno.edu</u>
  - Nydia Araya Email: <u>njaraya@loyno.edu</u>
- <u>Mongoose Cadence Resource Guides</u>
- <u>Mongoose Cadence Training (1 hour)</u>