Digital Document Delivery – Secondary Report Cards

January 26, 2022 ● Version 1.0

Schools can use Digital Document Delivery as an option to email secondary progress reports and final report cards to all parents who have opted in to receive documents digitally. For general instructions, refer to the Digital Document Delivery handbook.

Required Secondary Report Card Settings

Once grades are stored and Term GPA is calculated, the Secondary Report Card page must be configured with specific required parameters to ensure a successful delivery.

Navigate to the Secondary Report Card page and set parameters as follows:

Students to scan: Make the appropriate selection. **IMPORTANT!** K-8 Schools – Make a student selection that only includes secondary students. Do not include elementary students in this report.

Report type: Make the appropriate selection

Format: Select the **Hand-out** radio button (Required and the only option that will work with digital document delivery)
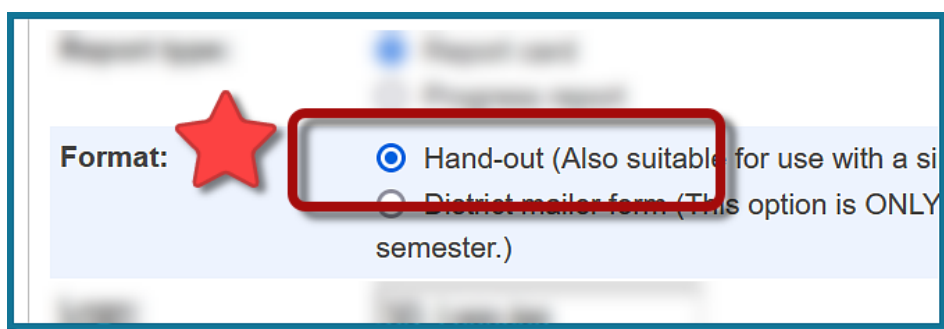
Logo: Select the *Set Default* button if this field is empty

Report Title: Enter the current academic year and the type of report

    Example: *2021-22 Semester 1 Report Card*

Reporting Term: Enter the appropriate reporting term

Sort order: Select the **Student Name** radio button (Required and the only option that will work with digital document delivery)

Meeting Time for Teacher Sort: Not used

Include legend: Select the **Yes** radio button

Report Cards to Print: Select the **Office Copy [Addressee: Student Name]** (Required and the only option that will work with digital document delivery)

DO NOT USE any other option

Print Job Name: Current academic year, followed by the type of report.
HINT! Copy and Paste the **Report Title**.

Comment: Enter **Digital Document Delivery** (Required for future reference)

Email Address: yourname@sandi.net (You will receive an email notification saying your grades have been processed. Ignore this message.)

Store Codes (Reporting Terms) for the report card: Complete the parameters here and click **SUBMIT.**

Saving the Report Card Report as a PDF

With the Secondary Report Card report open/displayed, locate the browser's Print button.

NOTE: The following screen captures were created using the most current web browser version. Your view may vary depending on the version you are currently using. For help with navigating older versions of a web browser, please contact the help desk.
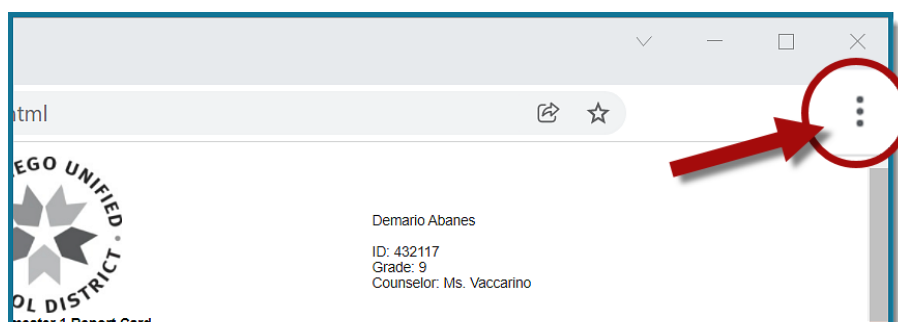
In Firefox

- Click **File** in the upper left tool bar, or the **three horizontal lines** to the far right of the address bar. Then click **Print** from the pop-up menu.
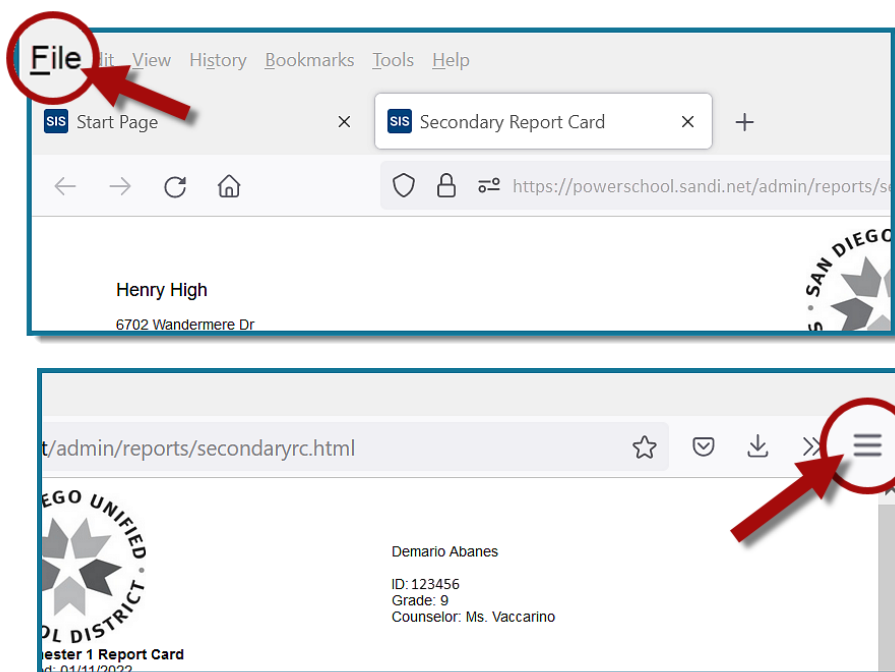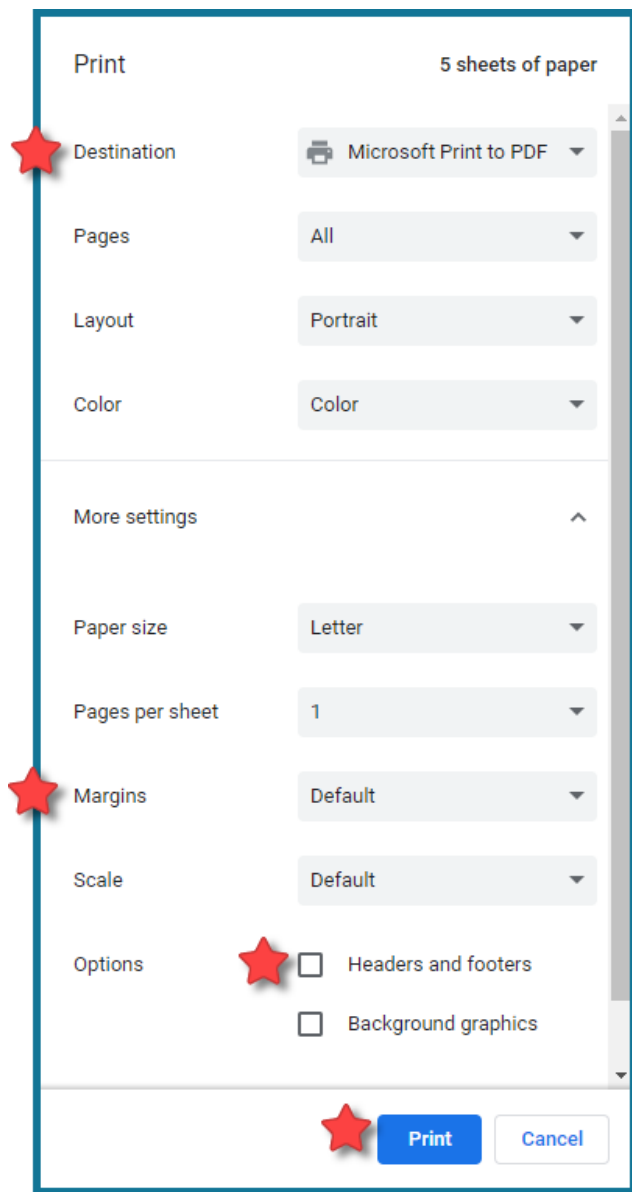

In Chrome

- Click the **three dots** to the far right of the address bar. Then click **Print** from the pop-up menu.

From the Print window:

- Select the appropriate **PDF printer**.

- Check **Margins. REMINDER -** Adjustments to the page margins may affect the way the page breaks, resulting in an incomplete or failed delivery. Each page should break *after* the student's address.

- Remove **Headers/Footers**

- Click **Print** or **Save** depending on the browser, then follow the prompt to save this file in a location you can find later.

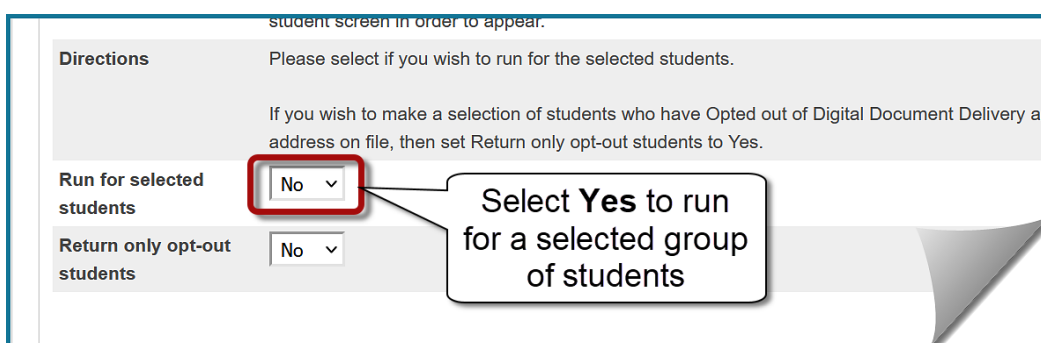| Print	5 sheets of paper
Destination	Microsoft Print to PDF
Pages	All
Layout	Portrait
Color	Color
More settings	^
Paper size	Letter
Pages per sheet	1
Margins	Default
Scale	Default
Options	☐ Headers and footers
	☐ Background graphics

Print   Cancel

Creating a Delivery Template (CSV)

By default, the Document Delivery Student List report includes all "opted-in" students with a valid parent/guardian email listed on the Document Delivery Preferences page.

To create a Delivery Template (CSV), do the following:

1. From the Start Page, under Reports on the left-side menu, select **sqlReports**.

2. Expand the Digital Document Delivery reports and select **Document Delivery Student List.**

3. **Run for selected students:** Select **Yes** to run for a student selection, otherwise enter **No**.
   K-8 SCHOOLS must have a student selection that only includes secondary students. *Do not include elementary students in this report*.

   Return only "opted-out" students: **HELPFUL HINT** After delivering report cards, re-run this report and select **Yes** to identify "opted-out" student who were not included in the delivery.

4. Click **Submit**.

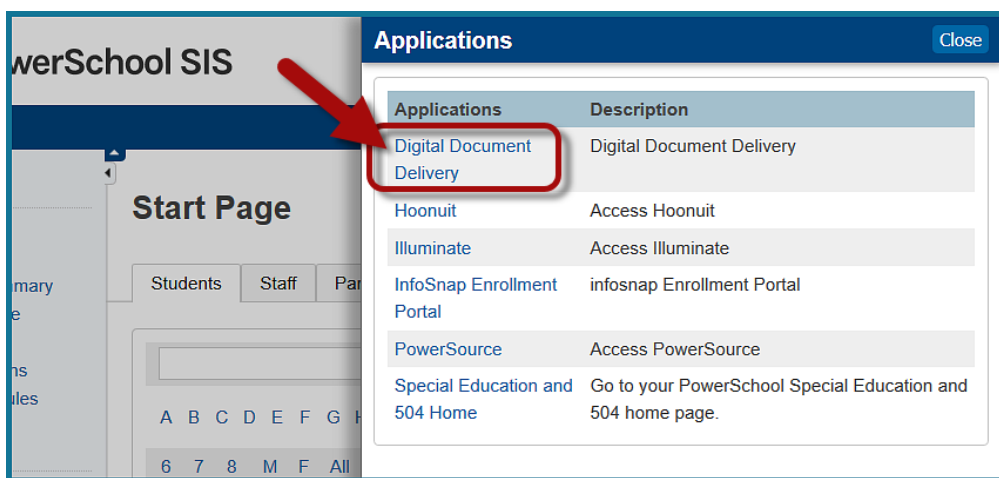5. When the report opens, click **CSV** at the top.

6. Save the **CSV** in the same location as your report cards or a location where you can find it later.

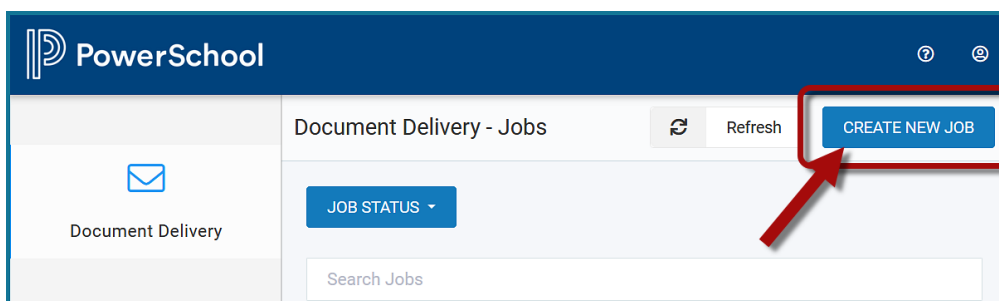## Creating the Job in the Document Delivery Portal

1. From the Start Page, click the **Applications** icon .
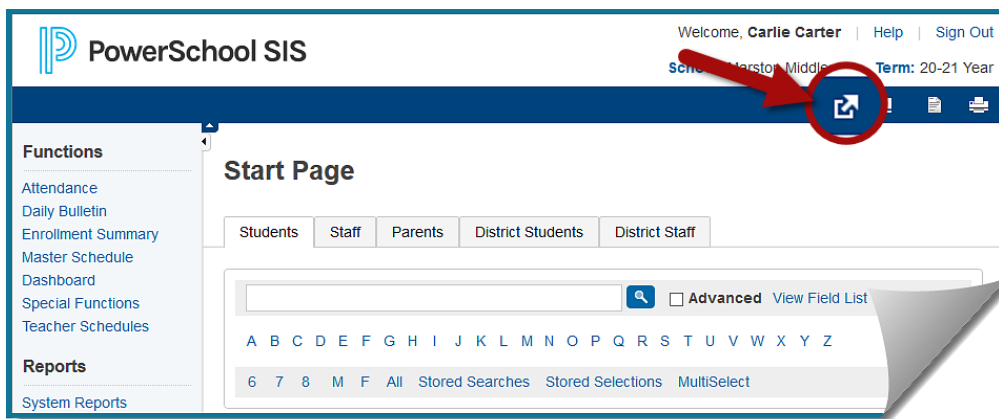
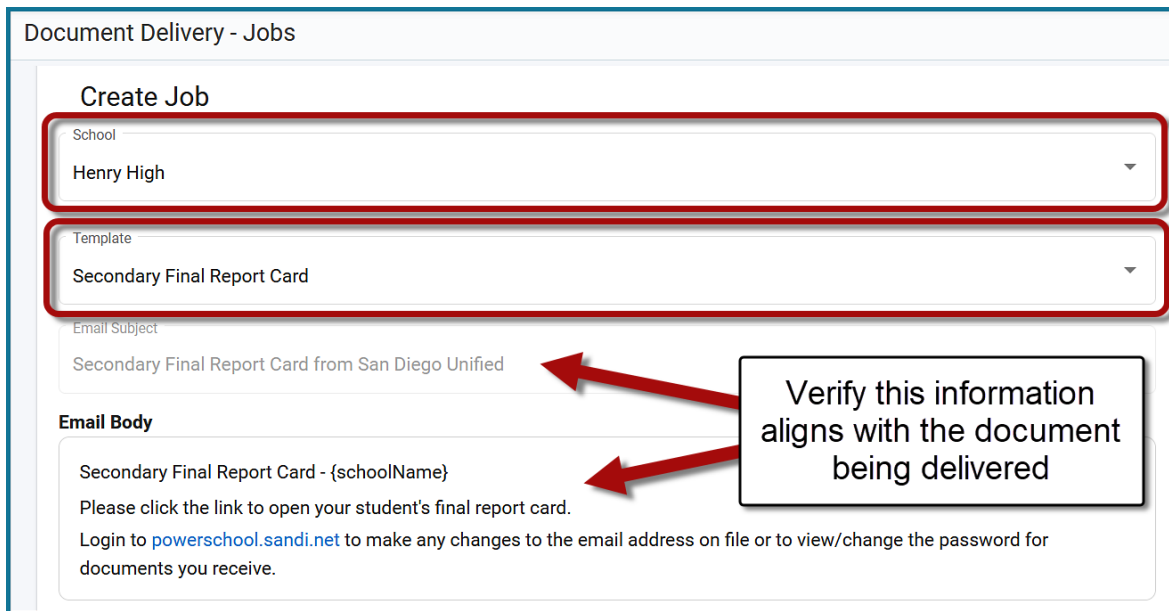2. On the Applications tray, select **Digital Document Delivery**.

3. On the Document Delivery – Jobs page, click **CREATE NEW JOB**.

4. Select **your School Name** from the School drop-down menu.

5. Select the appropriate email **Template** to use for this delivery.

   Secondary Progress Report Card – Select this template when sending P1, P2, P3, P4 progress reports

   Secondary Final Report Card – Select this template when sending S1, S2, Q1, Q2, Q3, Q4 report cards

6. The email subject and email body will be sent to parents/guardians along with the document download link. **IMPORTANT!** Verify that this message aligns with specific document being sent.

7. **OPTIONAL:** The **Test Email (optional)** feature can be used to check that the file is split correctly before sending to the recipient list.

   PLEASE NOTE: The email entered in the **Test Email (optional)** field will receive a separate document download email for each recipient on the list. For example, if there are 200 recipients on the list, the test email will receive 200 separate documents download emails.

8. Click the **PDF** upload button ⬆ locate the PDF file on your computer, then click **Open** to upload the file.

9. Click the **CSV** upload button ⬆ locate the CSV file on your computer, then click **Open** to upload the file.
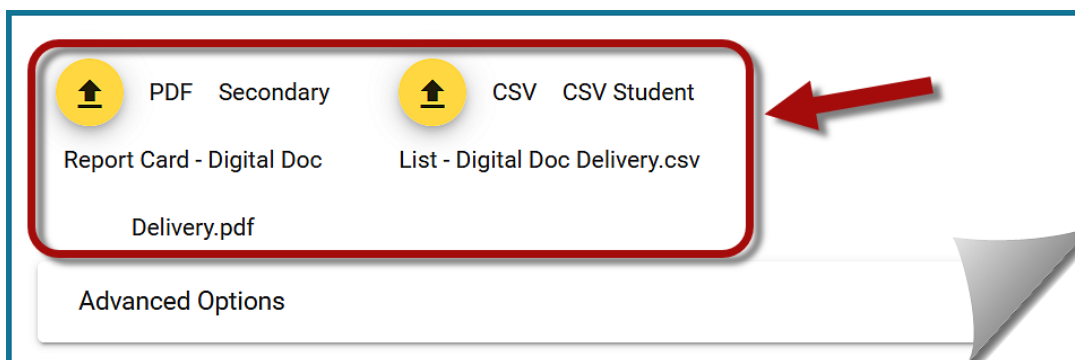
10. Verify the files uploaded correctly.
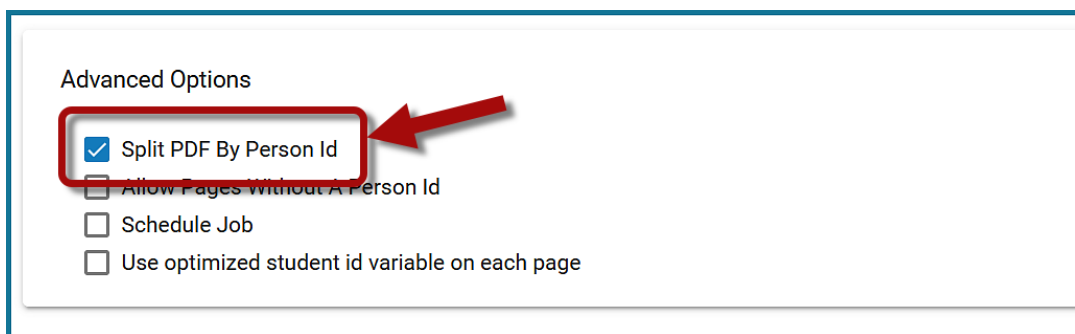
11. Click on **Advanced Options**:

12. Check the box **Split PDF by Person Id**.
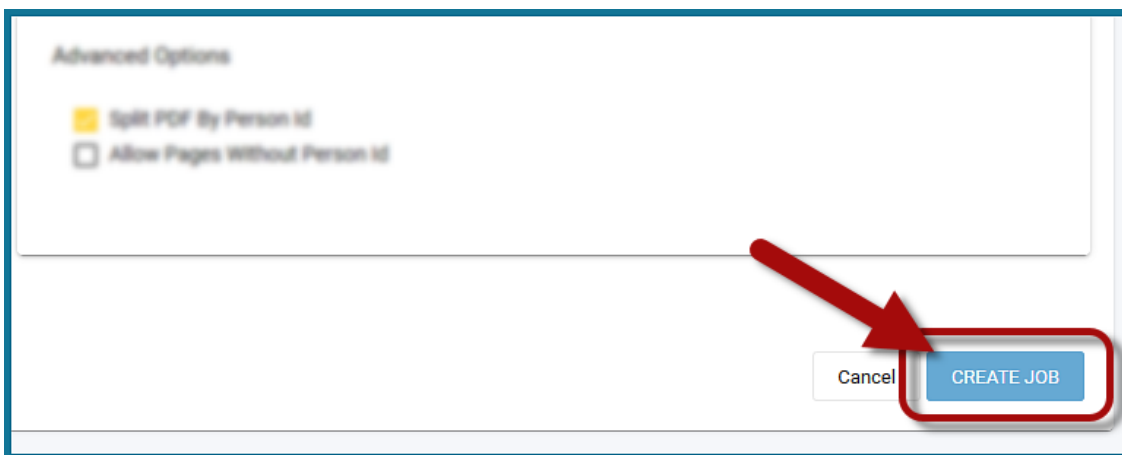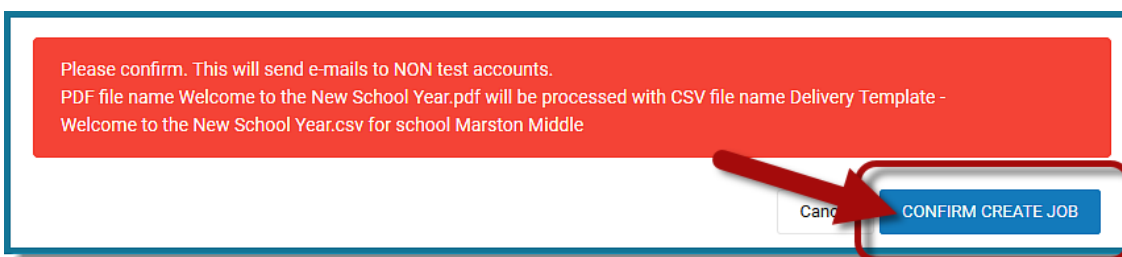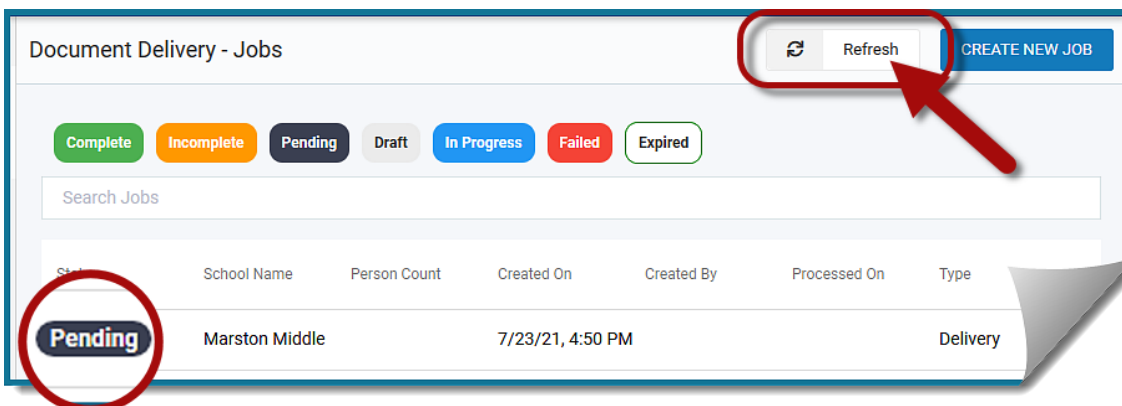

13. Click **CREATE JOB**.

A confirmation message will indicate the delivery will be sent using the uploaded PDF and CSV file.

14. If all looks good, click **CONFIRM CREATE JOB**.

15. On the Document Delivery – Jobs page, click the **Refresh** button to update the pending status of the job to see whether it completed successfully or not.

Refer to the Digital Document Delivery handbook for more information on verifying delivery status.