



Secure Document Delivery Guide

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Introduction

Many organizations use tools that produce large PDF reports, filled with individual reports for each recipient that includes each recipient's unique ID number. For example, a school's student information system may output one large PDF file containing report cards for each student. Each report card will have the student's ID number somewhere on the page. These reports are typically printed and e-mailed to each individual.

Secure Document Delivery (SDD) allows you to automatically slice (burst) large PDF reports, containing multiple member reports, into individual reports and then email each individual report to the corresponding contact in the database. SDD matches individuals to their portion of the PDF report using their ID number. Additionally, SDD can protect each individual report by requiring recipients to enter a password to open the file.

When using Secure Document Delivery, there are two possible methods of creating your document. One requires the creation of a template created by our support team. The other is a self-service option that allows you to create a document without needing assistance from our support team. Both options are highlighted in this document, however if you do not see an option you wish to use on your account, please contact your account manager to discuss.

Report Requirements

Reports must meet the following requirements to be used with SDD:

- SDD only supports PDF format. **The report must be a native PDF file. It cannot be an image file, or an HTML file saved as a PDF.**
- Each recipient's unique ID must be present in the report.
- If using a template, the location of the unique ID field, in the report, must not change from recipient to recipient. This requirement does not apply to self-service documents.
- All content being delivered to a specific user must be on consecutive pages (for example, the data for Karina West must be pages 41 to 44 rather than having the data on pages 41, 44 and 86).
- The Unique ID must be present on at least the first page of each recipient's report. It can be present on multiple pages in any single report, but it must appear on the first page of each report.
- The unique IDs must match what is currently in the Communicate database.
- The report file must be smaller than 100 MB in file size.
- There must be the same number of pages for each recipient's report in the PDF if using a template to create the document. This restriction does not apply to self-service documents.

Template Creation

If you are using templates to create and deliver your document, you will first need to have a template created. Templates, which are generated by our support representatives, are sets of rules used by SDD to burst your PDF file into individual reports for delivery. Once a template is created for a type of PDF file, it can be reused for future reports so long as the layout of the report has not changed. If the layout of the report changes, then you will need to work with support and have them create a new template for you.

To facilitate template creation, you will need to provide at least a portion of the PDF file, that you wish to burst, to our support representatives. Please provide support with a multiple-page example of what you want to deliver, or ideally, an actual report that you want to deliver. For example, if it is a student report card, include multiple students' report cards in the PDF file. Once you have provided support with the report, please allow one to two business days for the template be created. Support can create as many templates in advance as you need, but please allow one to two business days after sending support the report(s) to allow for any complications with the file(s) itself (e.g. missing IDs, layout changes, etc.). Support will contact you to let you know when the template has been created and is ready to be used to create your document.

 **Note:** If you would like to use SDD with a template to deliver report cards, contact support to create your templates well in advance of the end of the quarter or semester. Remember that once your template has been created you may use it for report cards repeatedly until your PDF layout changes, at which point support will need to create a new template.

Creating and Delivering a Document

 **Important:** Only those features that you have been granted access to will display. For access to additional features, contact your system administrator.

A document is created by uploading and processing your PDF file. This can be done with a template created with the help of the Communicate support team or it can be a self-service document (if you have this feature enabled). You can view your documents by clicking on the **Broadcasts** tab followed by the **SDD** subtab, as shown below:

Creating a New Document with a Template

Once support has created a template has been created for your PDF file, you are ready to create a document. Follow the steps below to create a document.



From the **Secure Document Delivery** screen under the **SDD** subtab, click the **Create New Templated Document** button to enter the **Document Editor**, shown above.

Type in a descriptive name for the document in the **Name** field.

Click the **Template** drop-down menu and select the template that is compatible with your PDF file.

Choose the **Identifier Text Location** to indicate the unique token you are using to indicate each distinct entry in your PDF.

Use the **PDF Portions** to choose if you want to optimize your PDF files. You can choose between the following two options:

- **Extract as-is:** This option will extract the individual portions but will not attempt to optimize the file sizes. This can be processed more quickly, but the recipients will be sent larger PDF files.
- **Extract and optimize:** This option will both extract the portions and optimize each portion to minimize the size of each file. This option may result in long processing times. If the processing time is taking too long, you can edit the document and change the option to **Extract as-is**. When you preview the document again, you should see processing speed significantly increased.

Click the **Choose File** button to locate the PDF file on your computer.



The screenshot shows a 'Document Editor' window with a 'Create New Document' form. The form has the following fields and options:

- Name:** Springfield ES Reports Cards - May 2023
- Template:** Report Card
- Identifier Text Location:** Unique ID
- PDF Portions:** Extract and optimize
- File:** Choose File Springfield E... May 2023.pdf

At the bottom of the form, there are two buttons: 'Upload' (with a green checkmark icon) and 'Cancel' (with a red X icon). A 'Guide' button is also visible in the top right corner of the form area.

Click the **Upload** button to upload the file and save the document. The document is now ready to be delivered at any time.

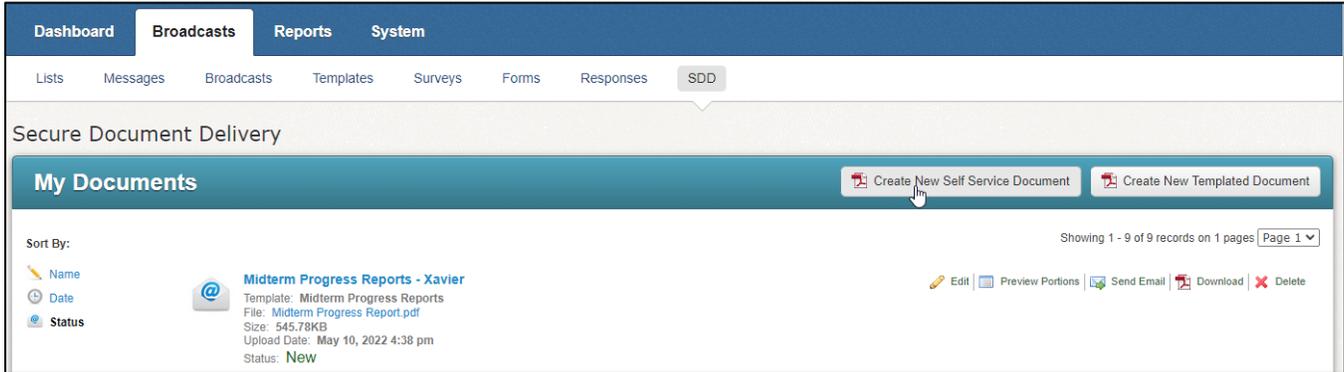
Your document will now be processed. Depending on the size of the document and whether you chose to optimize the portions, this may take some time.

Once the document is ready, you will see a message saying that **The PDF Document was successfully created**. This processing will continue whether you stay on the current page, go to **Preview Portions**, prepare another broadcast or even leave the app entirely.

Creating a New Self-Service Document

You are able to create a Self-Service Document yourself without needing support to create a template that matches your PDF.

 **Note:** If you do not see an option to create a self-service document and you are interested in using this feature, please contact your account manager to discuss enabling this feature on your account.



The screenshot shows the Intrado user interface. At the top, there are navigation tabs: Dashboard, Broadcasts, Reports, and System. Under 'Broadcasts', there are sub-tabs: Lists, Messages, Broadcasts, Templates, Surveys, Forms, Responses, and SDD. The 'SDD' sub-tab is selected, leading to the 'Secure Document Delivery' window. This window has a header 'My Documents' with two buttons: 'Create New Self Service Document' (highlighted) and 'Create New Templated Document'. Below the header, there is a 'Sort By:' section with options for Name, Date, and Status. A document entry is shown: 'Midterm Progress Reports - Xavier'. Details for this document include: Template: Midterm Progress Reports, File: Midterm Progress Report.pdf, Size: 545.78KB, Upload Date: May 10, 2022 4:38 pm, and Status: New. Action icons for Edit, Preview Portions, Send Email, Download, and Delete are visible next to the document entry. A pagination control shows 'Showing 1 - 9 of 9 records on 1 pages | Page 1'.

Click the **Broadcasts** tab, and then the **SDD** sub-tab. You'll be taken to the Secure Document Delivery window.

Click the **Create New Self Service Document** button to enter the Document Editor.

Enter a descriptive **Name** for the Document. The template will be set to Self-Service.

Specify the number of **Pages to skip at start** of your document. This is to bypass any title pages and other content at the start of your document that is not being shared.

Specify the number of **Pages to skip at end** of your document. This is to bypass any closing pages in your document that are not being shared.

Fill in the **Identifier Pattern**. This is text used to identify the first page of each portion of the document. This piece of text should be present on at least the first page of each portion, preferably a label that precedes the unique ID used to identify the student record in our database such as "Student ID:". See the example photo on the next page.

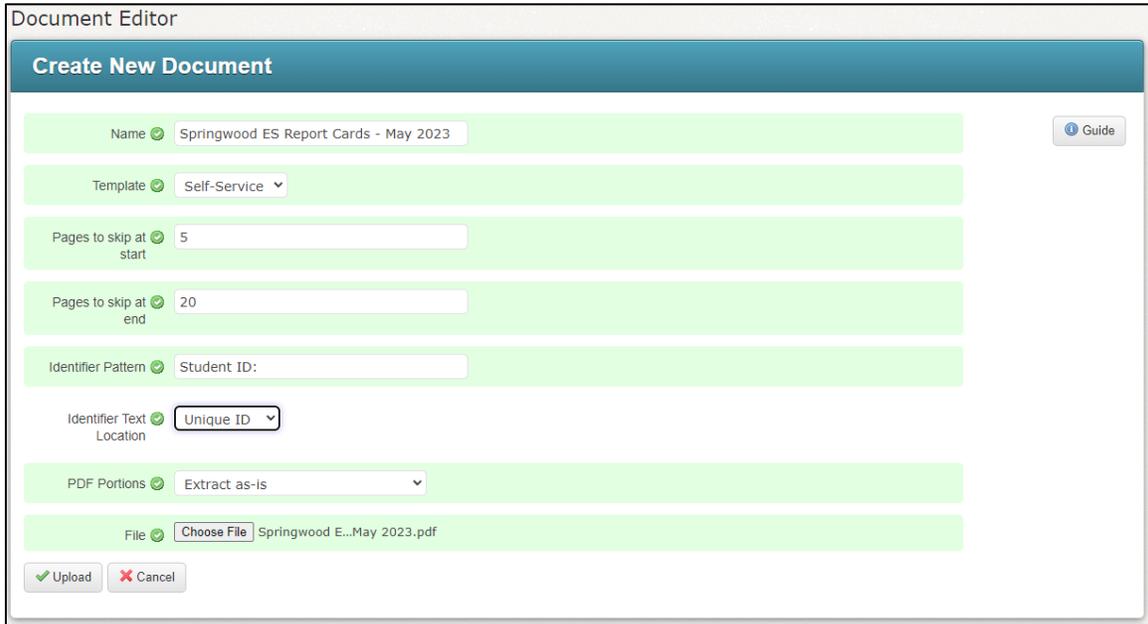
 **Important:** All the pages you wish to send to a specific user must be consecutive. Your identifier can appear on the first page of each portion of the document. It can also appear on the consecutive pages of the document. However, if it appears again later in the document (after the portion has ended), that later entry will be ignored. For example, if pages 56 and 57 have John Smith's student ID as the identifier and then page 105 also has John Smith's ID, page 105 will not be included in the section of the document that is delivered to John Smith.

The **Identifier Text Location** is used to match the unique id in the document with that data in our database. It should almost always be **Unique ID** but could also be another field that was set up by a support representative such as **State ID**.

Use the **PDF Portions** to choose if you want to optimize your PDF files. You can choose between the following two options:

- **Extract as-is:** This option will extract the individual portions but will not attempt to optimize the file sizes. This can be processed more quickly, but the recipients will be sent larger PDF files.

- Extract and optimize:** This option will both extract the portions and optimize each portion to minimize the size of each file. This option may result in long processing times. If the processing time is taking too long, you can edit the document and change the option to **Extract as-is**. When you preview the document again, you should see processing speed significantly increased.



Click the **Upload** button to upload the file and save the Document.

Your document will now be processed. Depending on the size of the document and whether you chose to optimize the portions, this may take some time.

Once the document is ready, you will see a message saying that **The PDF Document was successfully created**.



Previewing Document

To preview how your document will be sent and confirm that your IDs have been appropriately captured on each page, click **Preview Portions**.



On the preview page, you will see a **Summary** section.

Within this section, the **PDF Processing Status** will show you the PDF being processed for your preview. This will be updated in real time as each portion of your document is processed.

Summary	
PDF Filename	Midterm Progress Report.pdf
PDF Processing Status	Extracting and optimizing portions. Completed 30 of 97
Deliverable Portions	
Pages Per Portion	
Portion Sizes	

Once the process has completed, you will either see an error message indicating an issue with your PDF file or you will see that the process is **Complete and ready to deliver portions to contacts**.

Summary	
PDF Filename	Midterm Progress Report.pdf
PDF Processing Status	Complete and ready to deliver portions to contacts
Deliverable Portions	97
Pages Per Portion	1
Portion Sizes	From 58.37KB up to 59.84KB

You will also see the following:

- **Deliverable Portions:** The number of distinct portions that had been found in the file that fit the criteria to be sent.
- **Pages Per Portion**
- **Portion Sizes:** The range of sizes of the files that will be emailed from smallest to largest.

Deliverable Portions

In the Portions box, choose **Deliverable Portions** to see the portions that can be sent.

The following information will be displayed for each deliverable portion:

- **Identifier Text:** The text identifier being used. This will usually be Unique ID.
- **First Name:** The first name of the student.
- **Last Name:** The last name of the student.
- **Destinations:** Destinations associated with the portion.

- **Page:** The page of the PDF file where the portion is found.
- **Page Count:** The number of pages in the portion
- **Size:** The size of the portion being sent.

Portions						
View						
<input checked="" type="radio"/> Deliverable portions						
<input type="radio"/> Warnings						
<input type="radio"/> Ignored portions						
Identifier text: Unique ID	First Name	Last Name	Destinations	Page	Page Count	Size
101977	Porter	Klimecki	emails: 1	1	1	58.78KB
108533	Bella	Selby	emails: 1	2	1	59.00KB
108954 See warnings	Darrick	Shrigley	emails: 0	3	1	58.64KB
109353	Gratiana	Navton	emails: 1	4	1	58.81KB
101375	Lexy	Pengilly	emails: 1	5	1	59.50KB
100000	Dorena	Tire	emails: 1	6	1	59.34KB

To download an individual portion, click the ID under the **Identifier Text**.

If any of the deliverable portions have a possible issue, a message will be displayed telling you to **See warnings**. Portions with a warning will still be delivered but we recommend reviewing and resolving the warning.

If you click on the **Warnings** button, you will see any portions that had an error as well as an explanation of the error.

Portions							
View							
<input type="radio"/> Deliverable portions							
<input checked="" type="radio"/> Warnings							
<input type="radio"/> Ignored portions							
Identifier text: Unique ID	Warnings	First Name	Last Name	Destinations	Page	Page Count	Size
108954	EMAIL: No email destinations were found for this person	Darrick	Shrigley	emails: 0	3	1	58.64KB
100046	EMAIL: No email destinations were found for this person	Lynn	Clyman	emails: 0	17	1	59.48KB

If you click on the **Ignore Portions** button, you will see any portions that have been ignored and why they were ignored.

Portions			
View			
<input type="radio"/> Deliverable portions			
<input type="radio"/> Warnings			
<input checked="" type="radio"/> Ignored portions			
Identifier text: Unique ID	Reason	Page	Page Count
100012	UNKNOWN_IDENTIFIER: No person found that matches this identifier	8	1
100016	UNKNOWN_IDENTIFIER: No person found that matches this identifier	9	1
	MISSING_IDENTIFIER: No identifier found in portion	100	1

If you wish to resolve any of the warnings or include any of the ignored portions, you will need to edit and re-upload your PDF file.

Once you are happy with your file, click **Send Email**.



This will take you to the **Send Email** page. For more information, see the *Delivering Documents* section.

Delivering Documents

To send your document to recipients you can either click **Send Email** from the **Preview Portions** page for your desired document, or you can click **Send Email** directly from the **My Documents** section of the **SDD** tab.

It is recommended to go through **Preview Portions** so you can ensure there are no issues with your file prior to delivery.

Once you click **Send Email** from either page, you will be brought to the **Send Email** page.

At the top of the page, you will see a **Portion Summary** of the information that will be sent. This includes the following:

- **PDF Filename**
- **PDF Processing Status**
- **Deliverable Portions**
- **Number of Contacts with Emails**

PORTION SUMMARY	
PDF Filename	Midterm Progress Report.pdf
PDF Processing Status	Complete and ready to deliver portions to contacts
Deliverable Portions	97
Number of Contacts with Emails	95

In the **Broadcast Settings** section type in a name for the broadcast in the **Broadcast Name** field.

Broadcast Name 	Midterm Progress Reports
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Select a **Broadcast Type**.

Broadcast Type General
 Attendance
 Emergency

If Guardian Data Model is being used, you can select the target recipients just like in a list in the **Target Recipients** section. **Note – if you do not see this header, you can ignore this step.**

TARGET RECIPIENTS - YOU CAN SELECT CONTACT RECORDS AND/OR THEIR ASSOCIATED GUARDIAN RECORDS

Target Recipients Contacts
 Associated Guardians
 Both

Guardian Category Restriction Restrict to these categories:
 Primary
 Secondary

In the **Schedule** section, choose the **Date** of the delivery broadcast, the **Start Time** (earliest start time of the broadcast) and **End Time** (latest time the broadcast will run).

SCHEDULE

Start Date 02/12/2023

Start Time 7:30 am ▼

End Time 11:00 am ▼

In the **Secure Documents** section, you can use the **Require Password** drop-down menu to select a field that can be used as a password if you wish to require recipients to enter a password when viewing the document. If you do not wish to apply a password (not recommended), leave it set to **No Password**.

SECURE DOCUMENTS

 To require recipients to enter a password when viewing this Document, you must select Require Password.

Require Password Unique ID ▼

In the **Email Details** section, do the following:

- Type in a name that you wish to appear in the **From** field of the emails in the **From Name** field.
- Type in an email address that you wish to appear in the **From** field of the emails, in the **From Email** field.
- If you wish to set a reply email address that differs from the sender email address, fill it in to the **Reply to Email** field.
- Type in a subject for the email in the **Subject** field.
- If necessary, modify the text in the **Message** window. This is the message that the recipients will receive in the main body of the email.

EMAIL DETAILS

From Name ✓ SecureFile User

From Email ✓ broadcasts@schoolmessengermail.com

Reply To Email ✓ admin@yourexampledomain.com

Subject ✓ Midterm Progress Reports

Message ✓

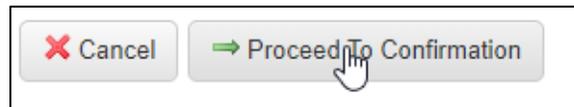
Hello,

Your School District has prepared a secure document for <<First Name>> <<Last Name>>.

If you have any warnings on your document, you will find a link that leads you back to the **Warnings** section of the portion previews.



Once your messages are ready to be delivered, click **Proceed to Confirmation**.



A summary of your review will be displayed.

Review and Confirm: Midterm Progress Reports

BROADCAST SETTINGS

Broadcast Name	Midterm Progress Reports
Broadcast Type	General
Start Date	2023-02-11
End Date	2023-02-11
Number of Portions	97
Require Password?	Yes
Password Field	Unique ID
Identifier Field	Unique ID

[← Modify Broadcast Settings](#) [→ Submit](#)

Review the broadcast details and click **Submit**.

Your document will begin its delivery immediately. Recipients will receive an email containing a link and a brief message instructing them to follow the link to download their PDF report. If the report requires a password, then recipients will need to enter the password to download their file.

At this point, the document delivery becomes like other email Broadcasts, and you can view the delivery results by accessing the **Email Log** report.

Cleaning Up

Once you have finished successfully delivering a secure document, we recommend that you **delete the original document in Communicate after backing it up locally**. This is because keeping sent documents clutters up the screen and increases the chances that you may end up delivering the document again by mistake. If you do decide to delete the secure document, then you should keep a local copy of the PDF that you sent out in case you later need to look at the document you have already sent.

Keep in mind that if you delete the secure document you will still be able to view the report for the email broadcast. If you decide not to follow our advice and not delete the secure document, then please be careful not to deliver the same document again by mistake in the future.

Deleting a Document

Follow the steps below to delete documents that you have already sent.

Find the document you wish to delete from the list in the **My Documents** window under the **Broadcasts** tab -> **SDD** sub-tab. **Make sure this is a document that you have already sent.**

Click the **Delete** link.

When the system prompts you and asks if you are sure you want to delete the item, click the **OK** button to proceed.



Springfield ISD - Lincoln Elementary Spring 2020
File: Report Cards.pdf
Size: 62.74KB
Upload Date: Oct 27, 2020 4:00 pm
Status: **Sent**

Report | Edit | Download | **Delete**

Questions?

If you have any questions regarding the above, please contact support.

SchoolMessenger Solutions Support

800-920-3897

support@schoolmessenger.com