



Secure Document Delivery Guide

West Corporation

100 Enterprise Way, Suite A-300

Scotts Valley, CA 95066

800-920-3897

www.schoolmessenger.com



Contents

West Corporation	1
Contents	2
Secure Document Delivery (SDD) Overview	3
Report Requirements	3
Template Creation	3
Creating and Delivering a Document	4
Create a New Document	5
Deliver Your Document	6
Cleaning Up	9
Deleting a Document	9
Questions?	9
SchoolMessenger Solutions Support	9

Secure Document Delivery (SDD) Overview

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 type of reports are typically printed and mailed to each individual.

Secure Document Delivery 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.

Report Requirements


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

- The report must be in PDF format. SDD only supports PDF format.
- Each recipient's unique ID must be present in the report.
- The location of the unique ID field, in the report, must not change from recipient to recipient.
- 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 the first page is required.
- 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.

Template Creation

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.

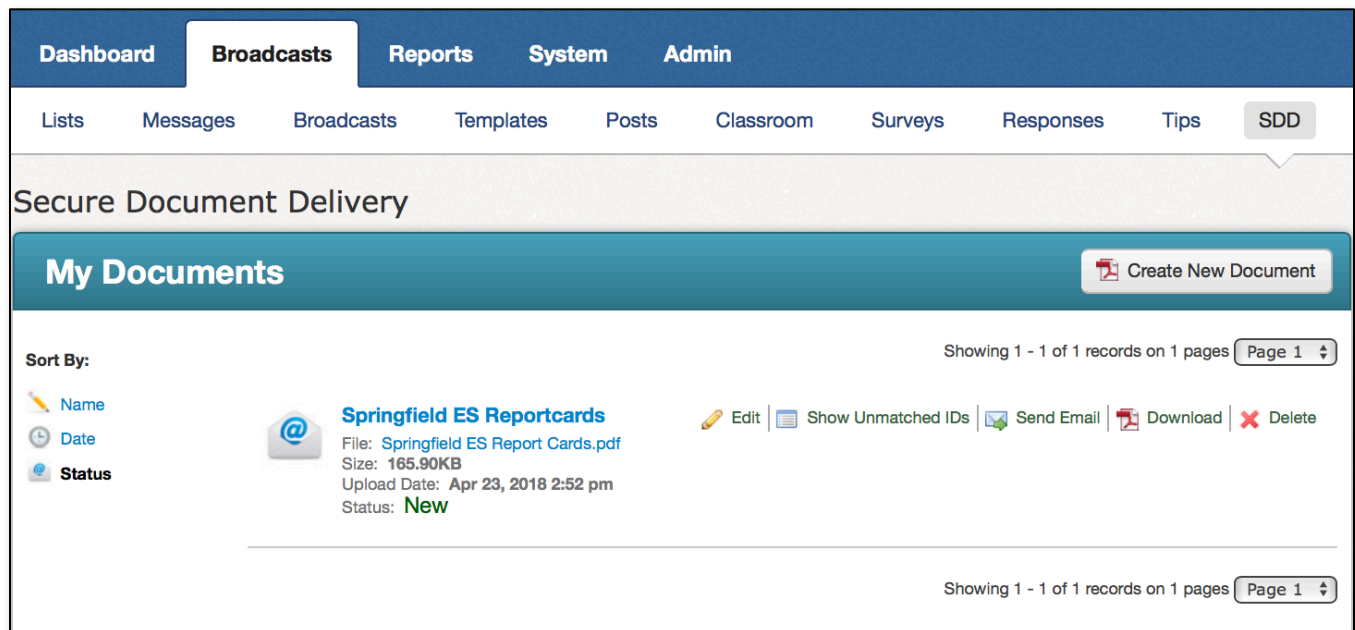
To facilitate template creation, you will need to provide at least a portion of the PDF file, that you wish to burst, to our support representatives. Please provide support with a multiple-page example of what you want to deliver, or ideally, an actual report that you want to deliver. For example, if 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 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 pairing your PDF report with a Template. You can view your documents by clicking on the **Broadcasts** tab followed by the **SDD** subtab, as shown below.



The screenshot shows the SchoolMessenger interface. At the top, there are navigation tabs: Dashboard, **Broadcasts**, Reports, System, and Admin. Under the 'Broadcasts' tab, there are sub-tabs: Lists, Messages, Broadcasts, Templates, Posts, Classroom, Surveys, Responses, Tips, and **SDD**. The main content area is titled 'Secure Document Delivery' and contains a section for 'My Documents'. On the right of this section is a 'Create New Document' button. Below this, there is a 'Sort By' dropdown menu with options: Name, Date, and Status. To the right of the sort menu, it says 'Showing 1 - 1 of 1 records on 1 pages' and 'Page 1'. The main document entry is for 'Springfield ES Reportcards'. It includes an '@' icon, the file name, file size (165.90KB), upload date (Apr 23, 2018 2:52 pm), and status (New). Action buttons for Edit, Show Unmatched IDs, Send Email, Download, and Delete are visible to the right of the document entry. At the bottom right, it again says 'Showing 1 - 1 of 1 records on 1 pages' and 'Page 1'.

Create a New Document

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

Document Editor

Create New Document

Name ✔

Guide

Template ✔

Progress Reports

File ✔

Choose File

Reportcards.pdf

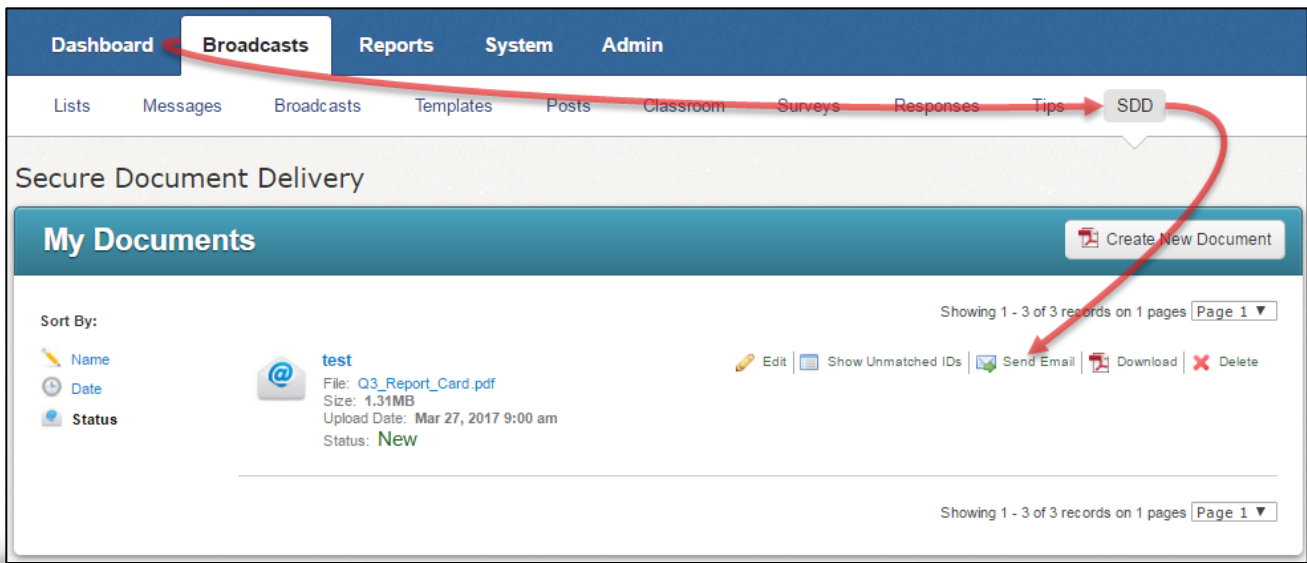
✔ Upload
✗ Cancel

1. From the “Secure Document Delivery” screen under the “SDD” subtab, click the **Create New Document** button to enter the “Document Editor”, shown above.
2. Type in a descriptive name for the document in the Name field.
3. Click the Template drop-down menu and select the template that is compatible with your PDF file.
4. Click the **Choose File** button then browse to and select the PDF file on your computer.
5. Click the **Upload** button to upload the file and save the document. The document is now ready to be delivered at any time.

Deliver Your Document

Follow the steps below to deliver your secure document to your recipients.

1. Find the document you wish to send from the list in the My Documents section of the Broadcasts tab > SDD sub-tab. Click the **Send Email** link next to the document to create a delivery email message.



2. In the "Broadcast Settings", section type in a name for the broadcast in the Broadcast Name field.

Broadcast Name test

3. Select a Broadcast Type.

Broadcast Type

- General
- Attendance
- Food Service
- Non-school Hours Emergency
- School Hours 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, 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).
- In the "Secure Documents" section, 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 on "No Password". For example, the password on a report card could be (and most often is) the student's unique ID number.

 **Important:** Leave the Identifier Text drop-down menu as "Unique ID" unless instructed otherwise by support during your SDD template creation. It is rare for anything else to be used. If unsure, contact support before changing this field.

SECURE DOCUMENTS

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

Require Password No Password ▼

Identifier Text Unique ID ▼

7. 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.
 - 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 ✔

From Email ⚠

Reply To Email

Subject ✔

Message ✔

Hello,

SchoolMessenger Support Services has prepared a secure document for you.

Please [click here](#) to download the document or copy and paste the text.

8. Click the **Send Now** button when you are finished. 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

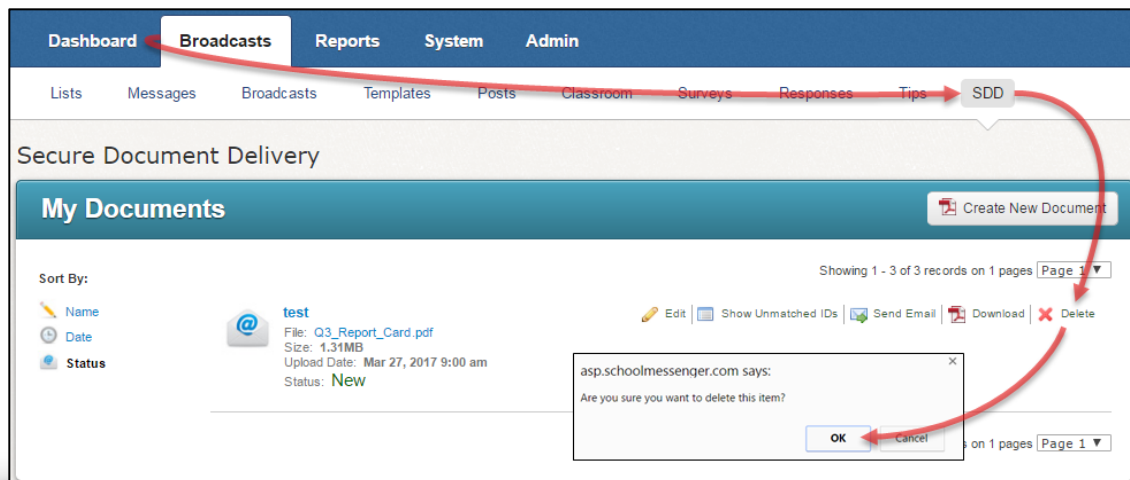
Once you have finished successfully delivering a secure document, we recommend that you **delete the original document in Communicate after backing it up locally**. This is because keeping sent documents clutters up the screen and increases the chances that you may end up delivering the document again 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.

1. 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**.*
2. Click the **Delete** link.
3. When the system prompts you and asks if you are sure you want to delete the item, click the **OK** button to proceed.



Questions?

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

[SchoolMessenger Solutions Support](#)

800-920-3897

support@schoolmessenger.com