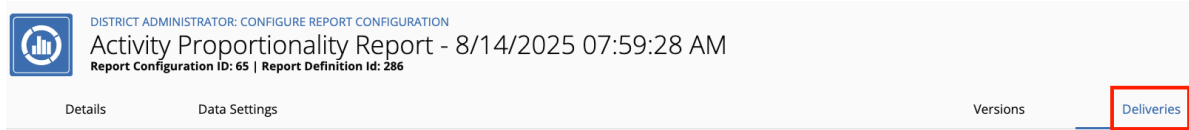


## Manage Deliveries

1. Click the **Deliveries** Tab to the right.
2. Click the **Add Record** button.

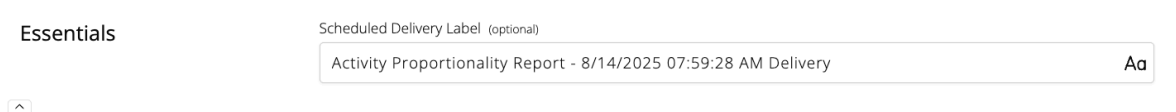


DISTRICT ADMINISTRATOR: CONFIGURE REPORT CONFIGURATION  
 Activity Proportionality Report - 8/14/2025 07:59:28 AM  
 Report Configuration ID: 65 | Report Definition ID: 286

Details      Data Settings      Versions      **Deliveries**

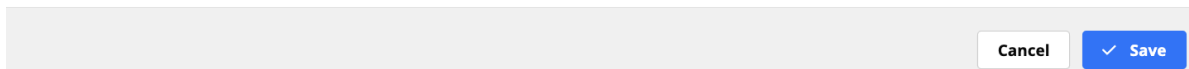


3. The **Scheduled Delivery Label** will automatically generate, but may be edited as needed.
4. Click **Save**.



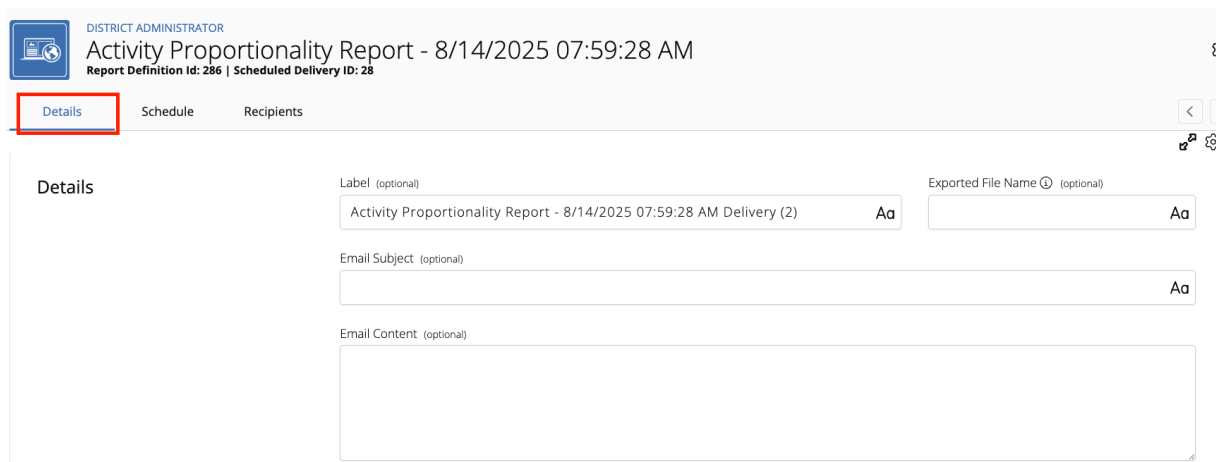
Essentials      Scheduled Delivery Label (optional)

Activity Proportionality Report - 8/14/2025 07:59:28 AM Delivery      Aa



Cancel      Save

5. You will see the **Details** tab for the scheduled delivery.
6. The **Label** will automatically generate, but may be edited as needed.
7. Filling in the **Exported File Name** (do not enter a file extension), **Email Subject**, and **Email Content** (a reminder of use) is optional.



DISTRICT ADMINISTRATOR  
 Activity Proportionality Report - 8/14/2025 07:59:28 AM  
 Report Definition ID: 286 | Scheduled Delivery ID: 28

**Details**      Schedule      Recipients

Label (optional)  
 Activity Proportionality Report - 8/14/2025 07:59:28 AM Delivery (2)      Aa

Exported File Name (optional)  
 \_\_\_\_\_      Aa

Email Subject (optional)  
 \_\_\_\_\_      Aa

Email Content (optional)  
 \_\_\_\_\_



8. **Testing:** (See below) Enter an email override address into the **Email Override** field to force all emails generated by the delivery to go to this address instead of the recipient.



Testing Email Override (optional) 

Enter an email override to force all email  Aa 

9. Click **Save**.

10. Click the **Schedule** tab at the top of the page and select a date on the calendar.

Details **Schedule** Recipients  

today  

August 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2


11. A popover window will appear. Select the day or days using either the **Calendar** or **School Calendar** radio button and select the additional information as needed, depending on the earlier selection.
- Click the **arrow** to the left of the month to reveal detailed dates. Click the field, choose one or more **checkboxes** to the left, and click **Accept**.

Days Day Selection Method (required)

Select the day or days, either by calendar or by school, on which the delivery will occur.

Calendar  School Calendar


Calendar Days (required)

8/1/2025  

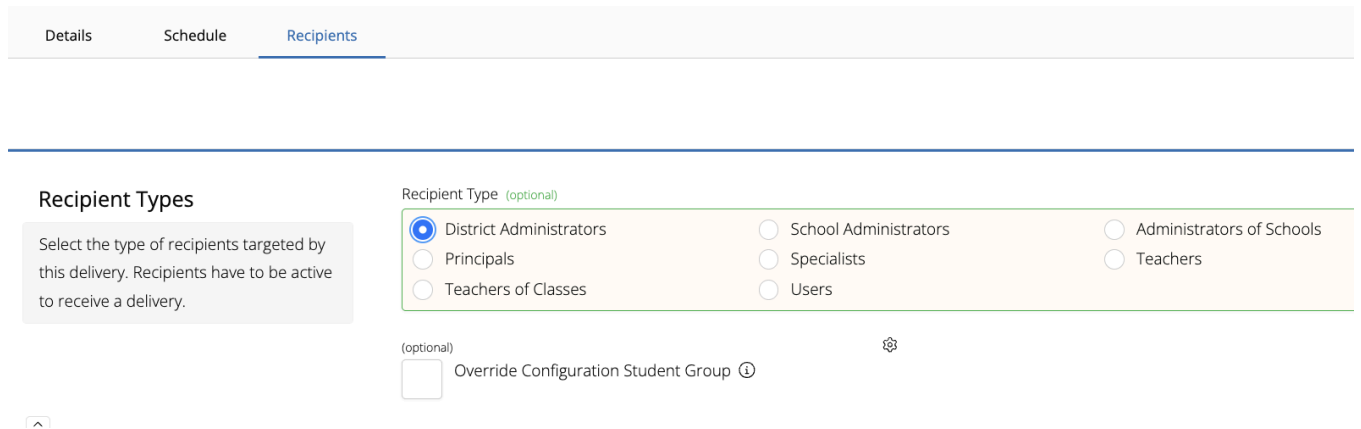
12. Select the time of day for the delivery to start processing by clicking the **Time of Day** field and clicking the **checkbox** to the left. Recipients will begin receiving their deliveries after the selected time.

13. Click **Save**.

Time Time of Day (required)

Select the time of day that you  

14. Click the **Recipients tab** at the top of the page.
15. Select the **Recipient Type** targeted by clicking the radio button. (District Administrators, School Administrators, Administrators of Schools, Principals, Specialists, Teachers, Teachers of Classes, Users) Recipients have to be active to receive a delivery.
16. Check the **Override Configuration Student Group box** if the student group you selected in the configuration should be replaced with a student group related to the recipient.
17. Select additional information as needed, depending on the selected recipient type.
  - **Employees/Schools:** Click the field, select the **checkbox** to the far left of one or more choices, and then click **Accept**.
  - **Current or Prior School Year:** Click the radio button.
  - **All Students/By Grade Level/Classes:** Click the radio button.
  - **Use (...) Predominant School Only:** Click the checkbox to use only the predominant school.
  - **Remove Withdrawn Students:** Click the checkbox to remove withdrawn students.
  - **Student Group:** Click into the box to locate the student group to send to the recipients.
18. Click **Save**.



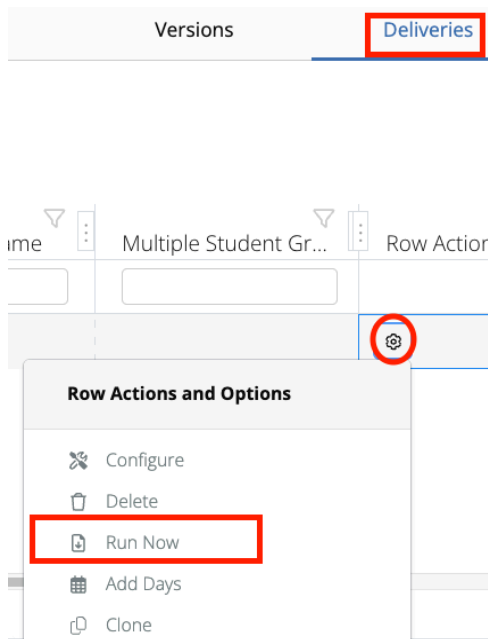
19. After the recipients are set up, click the “x” at the top right corner to close the delivery record.
20. In the data table of deliveries below, click the **Row Actions Gear** and choose one of the following actions:
  - **Configure:** Edit the delivery.
  - **Delete:** Remove the scheduled delivery.
  - **Run Now:** Run the delivery. (You may also run a test or validation run.)
  - **Add Dates:** Add one or more dates at once.
  - **Clone:** Clone to another recipient type.



## Test Delivery (Validation Run)


1. Start on the **Deliveries** tab.
2. After setting up Deliveries (Scheduled and Recipients are selected), click the **Row Action Gear** to the far right and choose **Run Now**.

**NOTE:** If you do not see **Run Now** in the **Row Action Gear** selections, Deliveries (Schedule and Recipients) have not been completed. Please return to setup.



3. If you want the emails generated by the process to be delivered to a specific email address rather than the recipient, enter it here. Fill in the **Email Override** field with an email address. (Use YOUR email address to test.) and click **Save**.

**NOTE:** If the Email Override is left blank and the Save button is clicked, the delivery will run as configured and deliver emails to the intended targets.

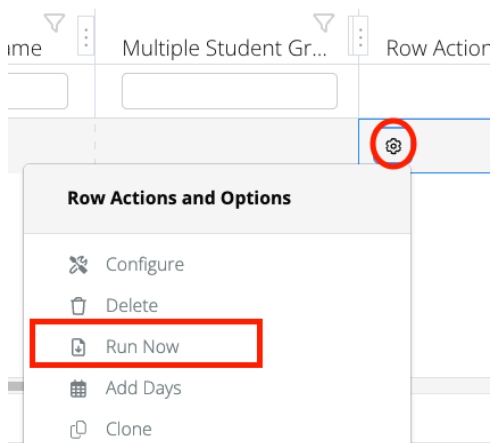


The screenshot shows the 'Testing' section of the interface. It includes a 'Testing' label, a dropdown menu with the text 'Enter an email override to force all email', and an 'Email Override (optional)' text input field. To the right of the input field is a settings gear icon and the text 'Aa'.

4. A **Data Delivery Validation Package** will be sent to your email address. Click the **Download Now** button to download and review the file.
5. You can also review the completed delivery in the data table on the **Deliveries** tab of the **Configure Student Data Grid** page.

## Run and Track Scheduled/Completed Deliveries

1. Start on the **Deliveries** tab.
2. After setting up Deliveries (Schedule and Recipients are selected), click the **Row Action Gear** at the far right and choose **Run Now**.



3. A **Data Delivery Completion Summary** will be sent to the recipient's email address.
4. Click the **Download Now** button to authenticate and download the file.
5. The scheduled or completed deliveries are listed in the data table on the **Deliveries** tab.
6. Click the **arrow** to the far left to view the scheduled and completed deliveries.
7. Click the **Row Actions Gear** to the far right to **View Recipients**. A popover window will appear with a data table of all recipients.
  - Click the **arrow** to the far left to reveal further details.
  - Click the **File icon** to download a copy of the file sent.