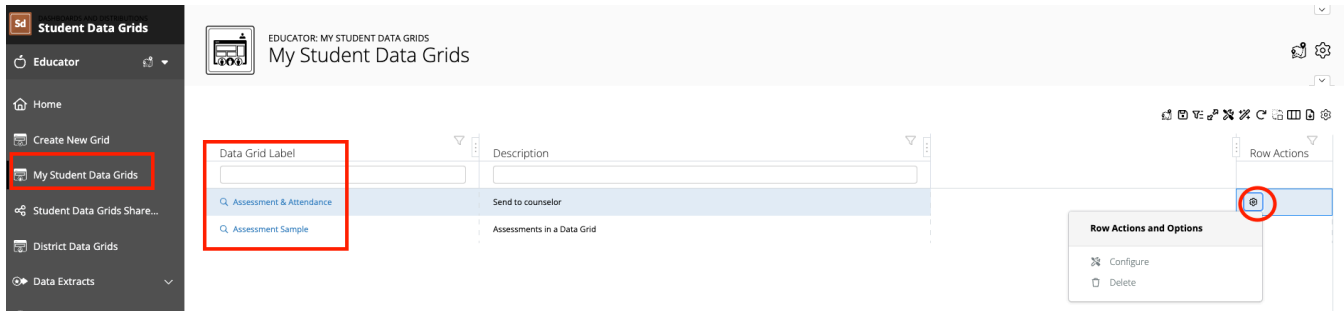


## Using Student Data Grids (Connect)

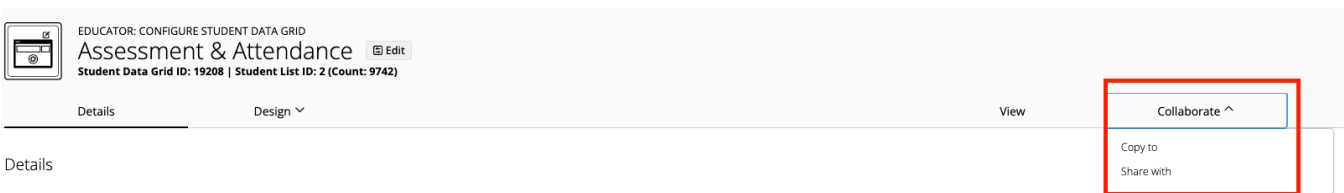
### Collaborate Tab

Use the **Collaborate tab** dropdown to either **Copy** or **Share** the grid with others.

1. Start by navigating to **My Student Data Grids** in the left navigation menu.
2. Click the **magnifying glass** in the **Data Grid Label** column to view the **Configure Student Data Grid** page.
3. Click the **Row Actions Gear** to the far right, then choose **Configure, Delete, or Copy to Me**.



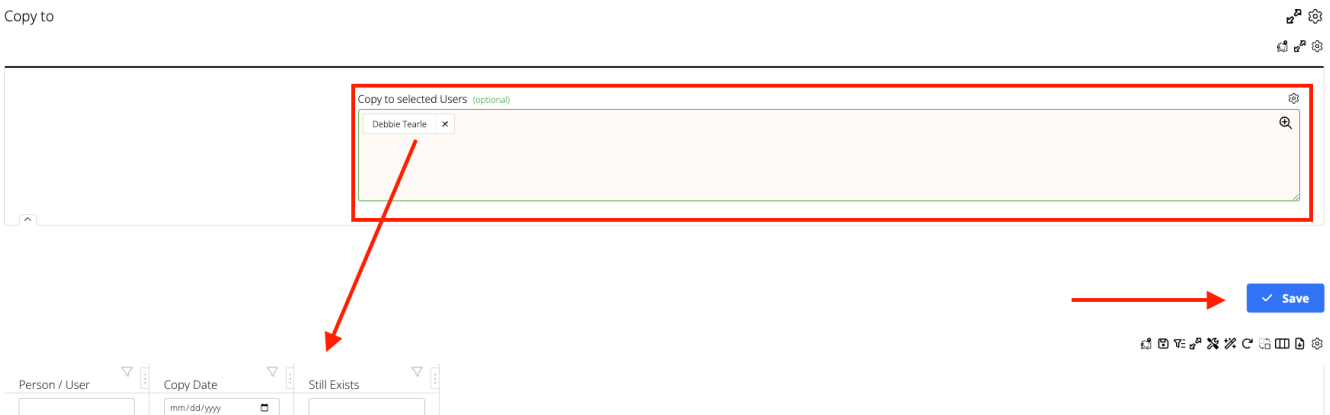
4. Click the **Collaborate tab** and choose one of the following options: **Copy, Share With**



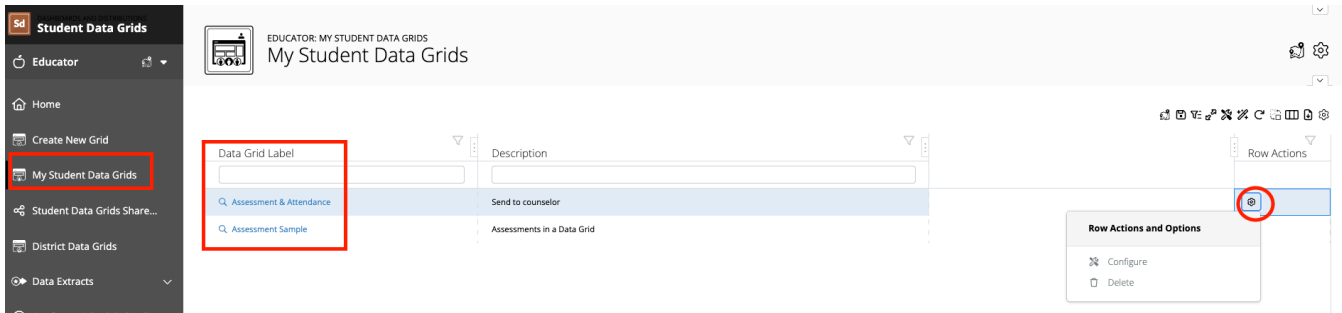
### Copy

This will give the selected user(s) a duplicate grid setup.

1. Click the **Collaborate tab** and choose **Copy** from the dropdown menu.
2. Click the **Copy to Selected Users** field, click the **checkbox** to the left of one or more users, and then click **Accept**.
3. Click **Save**.
4. The table below reflects the recipients of the grid, the copy date, and whether it is still in use.



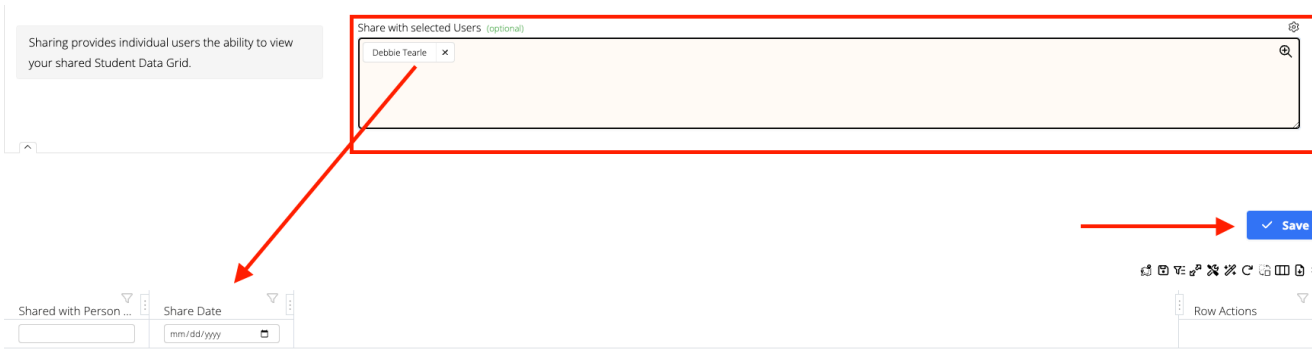
- The user will find the student data grid shared with them in the "My Student Data Grids" section of the left navigation, with a tag indicating that it has been copied.
- From the **Gear icon**, they can choose to **Configure** or **Delete**.



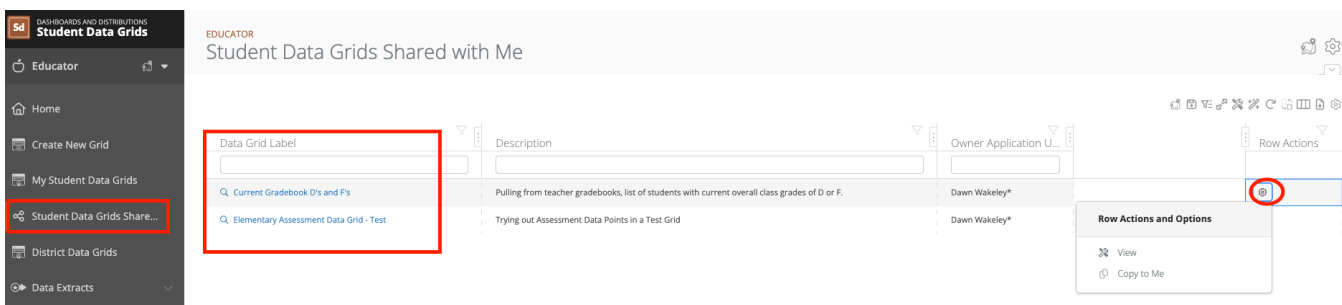
## Share

This will allow users to see any future changes to the grid.

- Click the **Collaborate** tab and select "Share With" from the dropdown menu.
- Click the **Share With Selected Users** field, click the **checkbox** to the left of one or more users, and then click **Accept**.
- Click **Save**.
- The table below reflects the recipients of the grid and the share date.



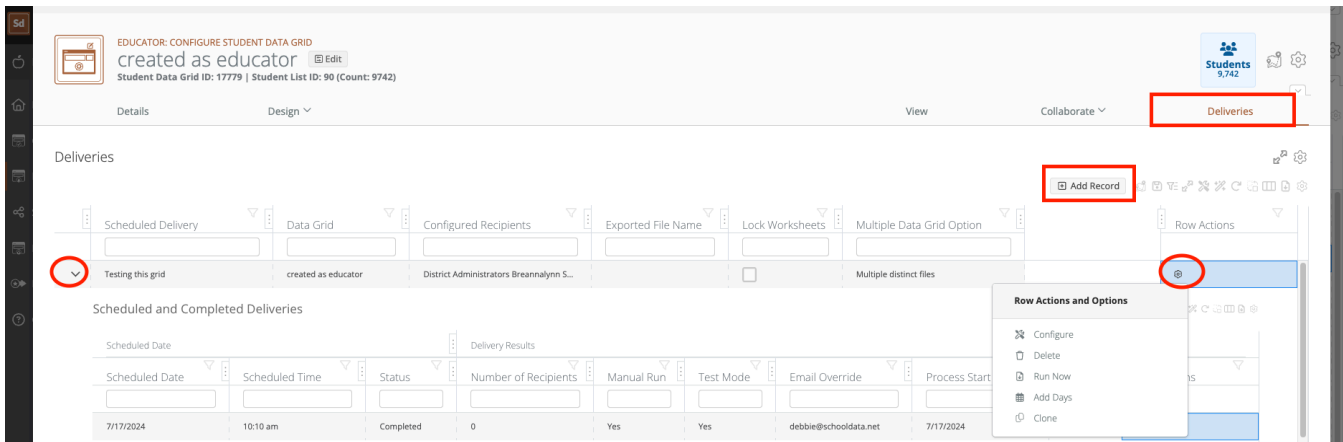
- The user will find the student data grid shared with them in the "Student Data Grids Shared with Me" section of the left navigation.
- Click the **magnifying glass** in the **Data Grid Label** column to view the **Configure Student Data Grid** page.
- From the **Row Action Gear** to the far right, choose **View** or **Copy to Me**.



## Deliveries

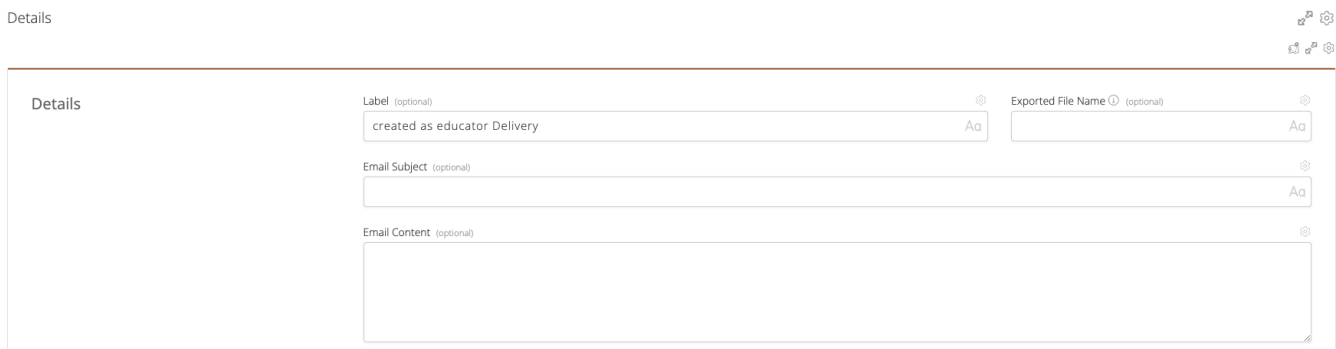
Create **delivery records** to send grids to users on a schedule. Here, you can add recipient types, schedule delivery dates, and customize email content and subject lines.

1. Click the **Deliveries** tab.
2. Click the **arrow** to the far left to view detailed information about scheduled and completed deliveries.
3. Click the **Row Actions Gear** to the far right to **Configure, Delete, Run Now, Add Days, or Clone**.
4. Click **Add Record** to begin a delivery.



The screenshot shows the 'Deliveries' section of the SchoolData.net interface. At the top, there's a header with 'EDUCATOR: CONFIGURE STUDENT DATA GRID' and 'created as educator'. Below that, there are tabs for 'Details', 'Design', 'View', and 'Collaborate', with 'Deliveries' being the active tab. A table titled 'Deliveries' is displayed with columns for 'Scheduled Delivery', 'Data Grid', 'Configured Recipients', 'Exported File Name', 'Lock Worksheets', 'Multiple Data Grid Option', and 'Row Actions'. A red box highlights the 'Add Record' button. Below the table, there's a section for 'Scheduled and Completed Deliveries' with a table showing delivery details like 'Scheduled Date', 'Scheduled Time', 'Status', 'Number of Recipients', 'Manual Run', 'Test Mode', 'Email Override', and 'Process Start'. A red box highlights a dropdown arrow on the left of the table, and another red box highlights a gear icon in the 'Row Actions' column. A 'Row Actions and Options' menu is open, showing options like 'Configure', 'Delete', 'Run Now', 'Add Days', and 'Clone'.

5. Fill in the **Scheduled Delivery Label** and click **Save**.
6. The window will refresh with further fields. The **Label** will automatically populate.
7. Fill in the **Exported File Name** (Do not enter a file extension), **Email Subject**, and **Email Content**. (This can be helpful if the recipient is unsure why they are receiving this delivery or a reminder of its use.)



The screenshot shows the 'Details' view for a delivery record. It features several input fields: 'Label (optional)' with the value 'created as educator Delivery', 'Exported File Name (optional)', 'Email Subject (optional)', and 'Email Content (optional)'. There are also checkboxes for 'Lock Worksheets' and 'Multiple Data Grid Option', and an 'Email Override' field with the value 'debbie@schooldata.net'. The 'Process Start' date is '7/17/2024'.

8. Click the **checkbox** if you wish to **Lock Worksheets**.
9. Click the **Multiple Data Grid Option** field and the **checkbox** to the left of the text.
10. Enter an **Email Override** to force all emails generated by the delivery to go to this address instead of the recipient if you want to test the delivery first. This step may be done at a later time. See [Testing and Tracking Scheduled or Completed Deliveries](#)

### 11. Click Save.

Student Data Grids (opt) Lock Worksheets

Multiple Data Grid Option (optional)

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Testing Email Override (optional)

Enter an email override to force all email generated by the delivery to go this address instead of the recipient.

## Delivery Schedule / Row Actions Gear: Add Dates

1. Click the **Schedule** tab.
2. Select the day or days by **calendar** or **school** on which the delivery will occur by first clicking the radio button and then selecting from the fields below.
3. Click the School or date field, select the **checkbox** to the left, and click **Accept**.
4. Click the arrow to the left to view further detailed dates.

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

School (required)

School Calendar Days (required)

5. Select the **Time of Day** similarly.
6. Click **Save**.

Time Time of Day (required)

Select the time of day that you want the delivery to start processing. Recipients will begin receiving their deliveries at some point after the selected time.

## Recipients

1. Click the **Recipient tab**.
2. Select a **Recipient Type** for this delivery by clicking the radio button. Depending on the type selected, the available fields will differ. Fill in the required fields and make adjustments as desired. (District Administrator, Principals, Teachers of Classes, School Administrators, Specialists, Specific Persons, Administrators of Schools, Teachers, Specific Application Users).
  - **District Administrator / School Administrators / Principals / Specialists / Teachers / School / Classes / Student Group / People:** Click the field, select one or more **checkboxes** to the left, and click **Accept**.
  - **Students From Year:** Click the radio button for the **Current School Year** or **Prior School Year**.
  - **Group Students:** Click the radio button for '**By Class**', '**All Students**', or '**By Grade Level**'.
  - **Use Administrator / Specialists Predominant School Only:** Click the **checkbox** to use the predominant school only.
  - **Remove Withdrawn Students:** Click the **checkbox** to remove withdrawn students.

Recipients

**Recipient Types**

Select the type of recipients targeted by this delivery.

Recipient Type (optional)

<input checked="" type="radio"/> District Administrators	<input type="radio"/> School Administrators	<input type="radio"/> Administrators of Schools
<input type="radio"/> Principals	<input type="radio"/> Specialists	<input type="radio"/> Teachers
<input type="radio"/> Teachers of Classes	<input type="radio"/> Specific Persons	<input type="radio"/> Specific Application Users

**District Administrators**

District Administrators (required)

**Students From Year** (required)

Current School Year     Prior School Year

**Group Students** (required)




All Students     By Grade Level

(optional)

Remove Withdrawn Students

## Run Deliveries / Testing and Tracking Scheduled or Completed Deliveries

1. After recipients have been set, exit the delivery record.
2. On the record just added, click the **Row Action Gear** and choose **Run Now**
3. Enter your email in the **Email Override** field. This was formerly known as a "validation run." **NOTE: If you do not, clicking save will cause the delivery to run as configured and deliver emails to the intended targets.**
4. Click **Save**.

**Essentials**

Clicking save will cause the delivery to run. If you want the emails generated by the process to be delivered to a specific email address rather than the recipient, enter it here. This was formerly known as a "validation run". If the Email Override is left blank, the delivery will run as configured and deliver emails to the intended targets.

Email Override (optional) ⓘ

Filename Override (optional) ⓘ

Aa

Cancel
Save

## Clone

Once a delivery is set for one recipient type, clone it and set it for another recipient type.

## Other Tips

- To generate reports with varied file names and groups, create a **Delivery Record** with recipients, either specific individuals or application users, which allows for student group selection or saves it. Click the **Row Action Gear** on the deliveries page and choose **Run Now**. Fill in the form as needed. If the delivery record created is only for you, there is no need for an email override.