MySchoolSask MonÉcoleSask

Fundamentals

February 2019 v1.0

saskatchewan.ca

Government of Saskatchewan

Version History

Version	Date	Description
1.0	February 19, 2019	First published version after full review.

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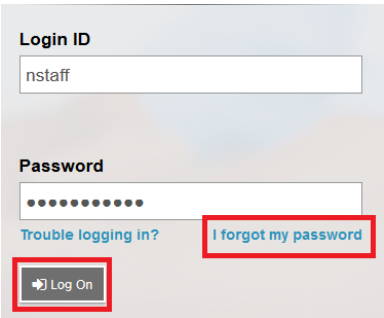
1.0 Fundamentals Logging In

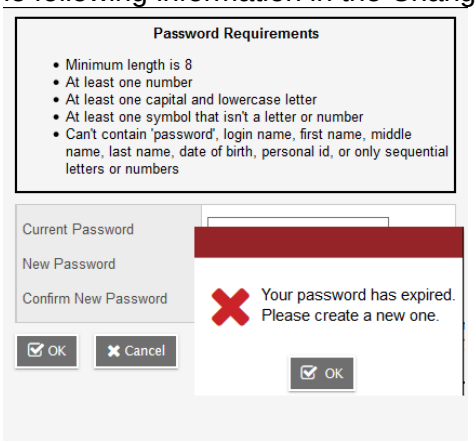
Individuals will receive their login name (username) and temporary password from their school or Division support staff. On initial log in, users will be required to change the temporary password before they can proceed. Passwords must meet the following criteria:

- Minimum length is 8
- At least one number
- At least one capital and lowercase letter
- At least one symbol that isn't a letter or number
- Cannot contain 'password', login name, first name, middle name, last name, date of birth, personal id, or only sequential letters or numbers.

Enter the username and temporary password in the Login screen, and click **Log On**:



Enter the following information in the Change Password pop-up that displays next:



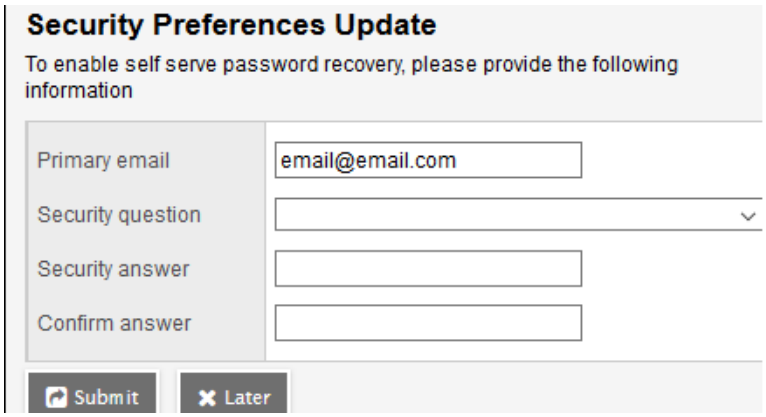
- **Current Password** – enter the assigned temporary password
- **New Password** – enter the new user created password
- **Confirm New Password** – enter the new user created password a second time

Click **OK**.

The Security Preferences Update pop-up window opens next. Setting security preferences will make it possible for a user to use the ***I forgot my password*** option that displays on the login screen. Enter the following information:

- **Primary email** - confirm or enter the user email that will be used for password recovery

- **Security question** – select a question from the dropdown list
- **Security answer** – enter the answer to the selected question
- **Confirm answer** – enter the answer to the selected security question a second time



- Click **Submit**

Alternatively, select **Later** and the Security Preferences Update pop-up window will display again on the next login.

2.0 Managing User Preferences

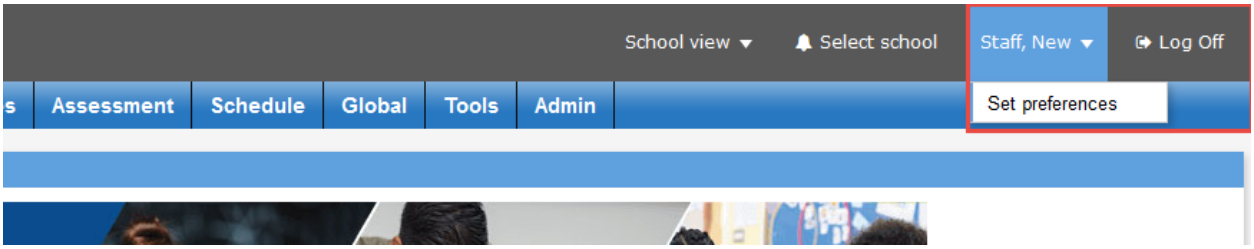
2.1 Security

The level of access each individual has in MySchoolSask, i.e. what data elements and menu items they can see, etc., is determined by the security role(s) assigned to their user account by their Division or school.

2.2 Settings Bar

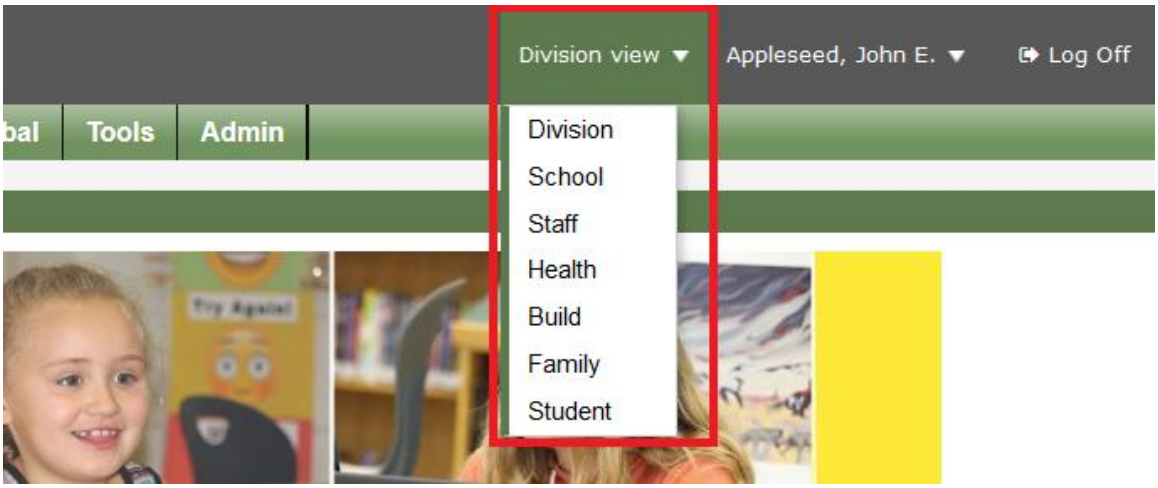
The settings bar is the first level of navigation in MySchoolSask. The options visible to the user are determined by the security access granted by the Division. *Select School*, for example, will only appear if the user has access to more than one school.

All users see ***Set Preferences***, in the drop down menu under their name, and ***Log Off.***



2.2.1 View Navigation

The View that individuals see when they login, e.g. Division, School, Staff, etc., is the default view for the security role assigned to their user account. If a user has several roles assigned, the preferred View can be set as default under user preferences. Users with access to multiple views, as illustrated below, have a dropdown selection for view navigation. Selecting a different view from the dropdown changes the way the information is displayed, and scopes the information to the selected view. The example below shows the options typically available to a Division level user.



To change views:

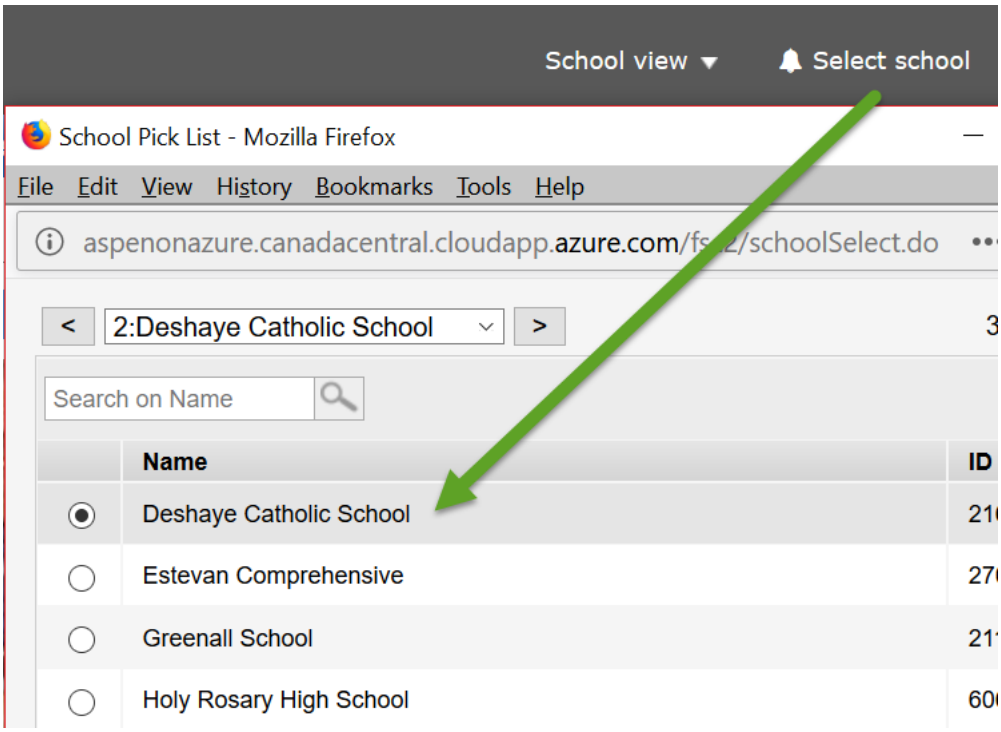
1. Click the drop down menu under the current **View** on the settings bar
2. Select a view.

2.2.2 Select School

If the user account has access to more than one school, the Select School option will appear on the settings bar menu.

To select a school:

1. Click **Select School** on the settings bar.
2. In the pop-up window that displays, click the radio button beside the appropriate school.
3. Click **OK**.

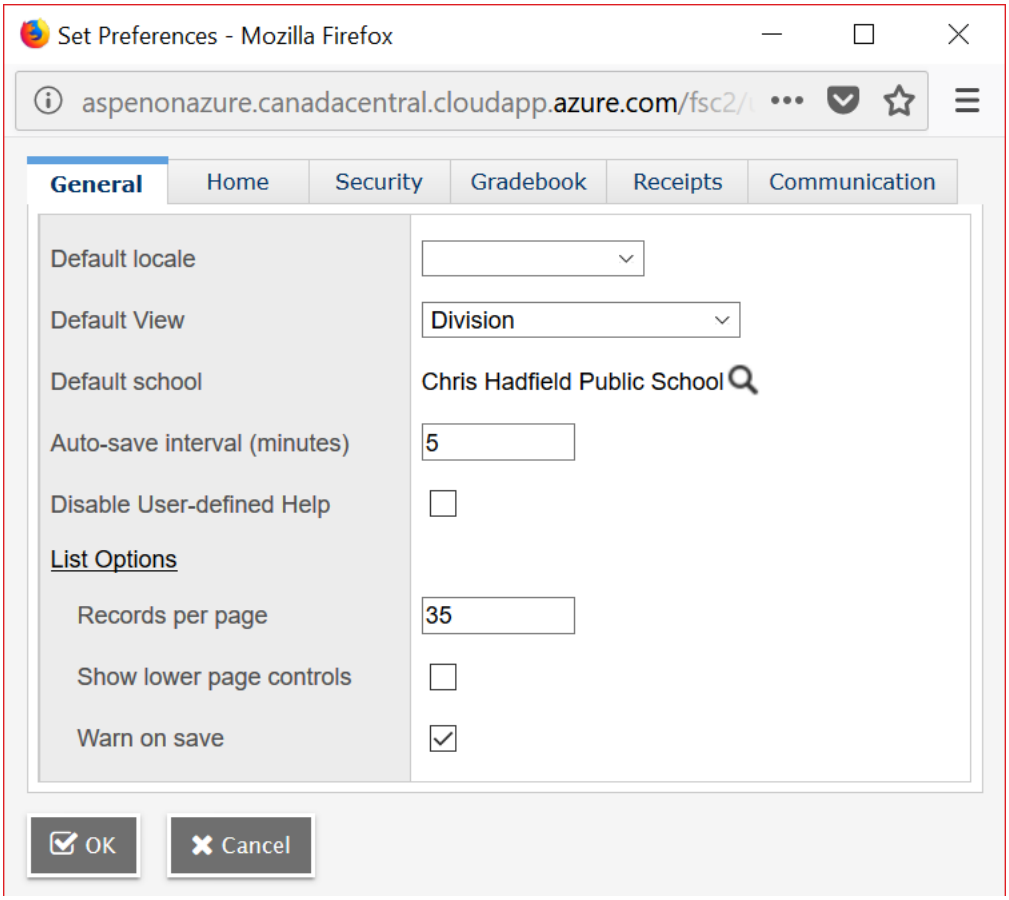


2.2.3 Set Preferences

This option on the settings bar allows users to personalize MySchoolSask. The preferences that display in the pop up are specific based on the roles assigned to the user account and depend on the view the user is in, e.g. Division view is different from School view.

2.2.3.1 General

The settings under the General tab determine the default presentation of screens for the user – i.e. the default view and school as well other options of a general nature. See the table following the screenshot for a definition of each of these fields.

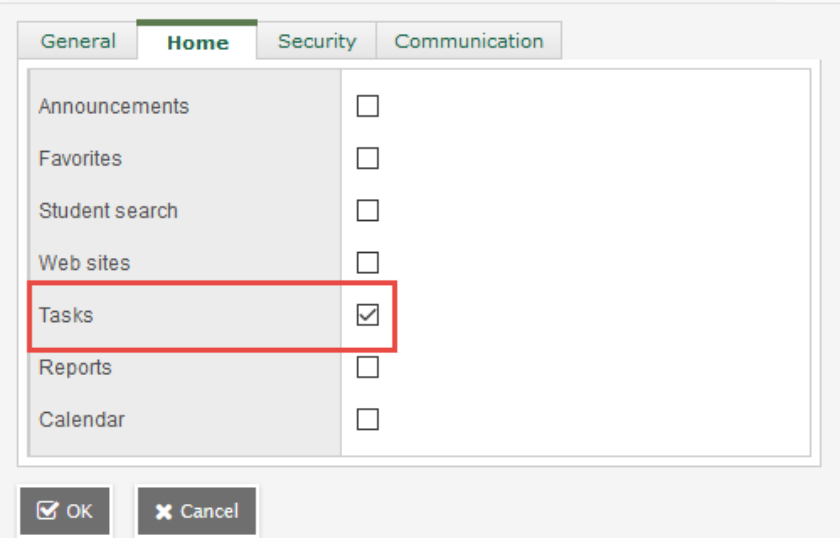


Field	Description
Default Locale	Click this drop-down to select the language and date preferences when using MySchoolSask. This selection also affects the display of dates in MySchoolSask. select: **Canada**: Dates appear as date/month/year **French (Canada)**: Dates appear as year/month/date **US**: Dates appear as month/date/year **Note:** A Default Locale must be set to prevent exception errors when saving preferences, including the Gradebook Preference Settings.
Default View	Click this drop-down to select the default view when logging on to MySchoolSask if the user has more than one view.
Default School	Click the 🔍 to select the default school when accessing the School view if the user has more than one school.
Auto-save interval (minutes)	Type the number of minutes to lapse before the system automatically saves the information entered on a detail page. The system displays a message to the right of the **Save** and **Cancel** buttons on detail pages, alerting the user of the time of the last auto-save, or why the auto-save failed.

Field	Description
Disable User-defined Help	This disables the user-defined help icon for fields. This icon gives brief "tip" information on what is expected in that field.
Records per page	This determines how many records display on the screen in a list before moving to the next page to see more. Set at the Enterprise level, the maximum records per page is 35.
Show lower page controls	Page controls display at the top of a page where the number of records in the list exceeds one page. To display the page controls at the bottom of all list pages, select this checkbox.
Warn on save	Check this box to display a warning when the user clicks Save on a list page after using the Modify List option. This is specific to the Modify List function and does not affect the user prompts to save when changing screens or tabs in the application.

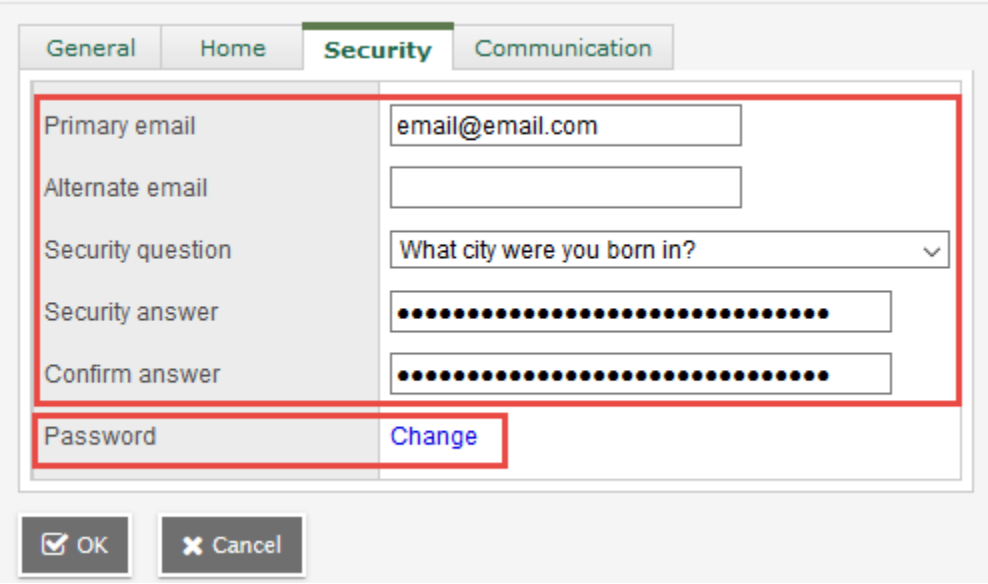
2.2.3.2 Home

The **Home** top tab in Set Preferences will allow users to select page widgets that they want to see on the Landing Page. What is available here will be determined by a provincial decision.



2.2.3.3 Security

The Security sub-top tab in Set Preferences records the user's email address, and the security question and answer, that are required to enable the *I forgot my password* functionality on the login screen. User Passwords can be changed here by clicking the blue hyperlink *Change* then entering the current password and new password in the pop-up screen.



Field	Description
Primary email	Type the primary email address. The system sends the password to this address when the 'I forgot my password' link on the logon page is used. Note: This is the address that displays in the From field when using the Send Email option.
Alternate email	If an alternate email address is entered, e.g. for a Google Docs account, that address displays. This has no functionality in MySchoolSask.
Security question	Click this drop-down to select the security question to be used for the "I forgot my password" function.
Security answer	Type the answer for the security question. This will be case-sensitive.
Confirm answer	Type the security answer again.
Password	Click Change to change a user password. Password requirements can be viewed by clicking Click to view.

2.2.4 **Log Off**

Use the **Log Off** button in the top right hand corner of the *Settings Bar* to exit MySchoolSask. This will properly terminate the session.

2.3 Removing Browser Buttons (F11)

Browser buttons for back and forward and cancel should not be used to navigate the application. Navigating with the browser buttons can generate *application errors* or *browser out of synch* errors.

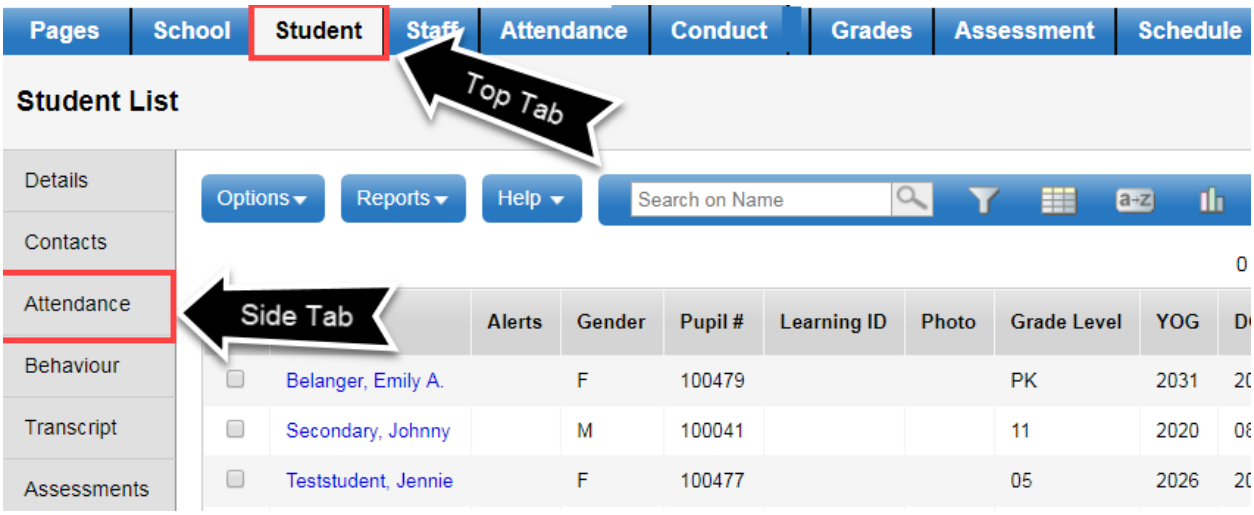
F11 will hide the browser menu, removing the back, forward and cancel browser navigation. This is a toggle function; pressing F11 again will return the browser buttons.

3.0 Navigation Tools & Selecting Records

3.1 Top Tabs and Side Tabs

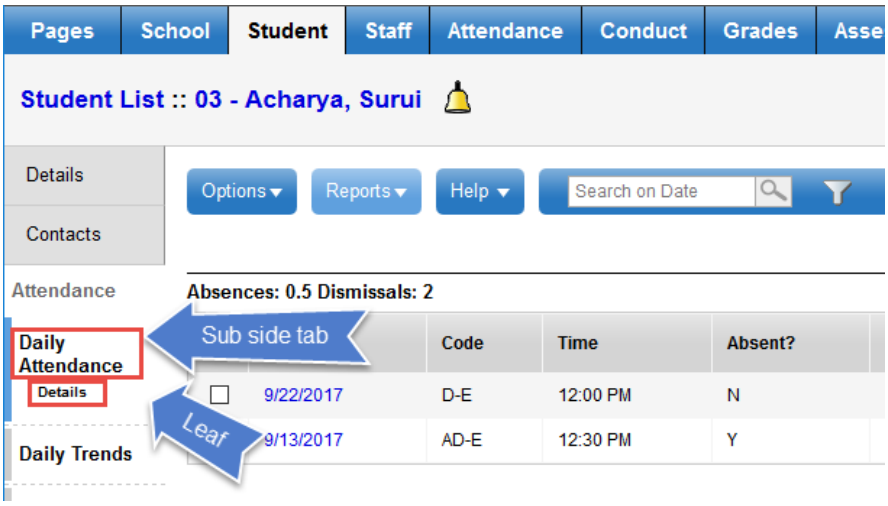
Top tabs represent functional areas of MySchoolSask. These are scoped to the user role so a user will only see what they have been given access to. The top tab that is highlighted indicates where the user is in the application.

Side tabs provide access to additional details of the top tab functional area.

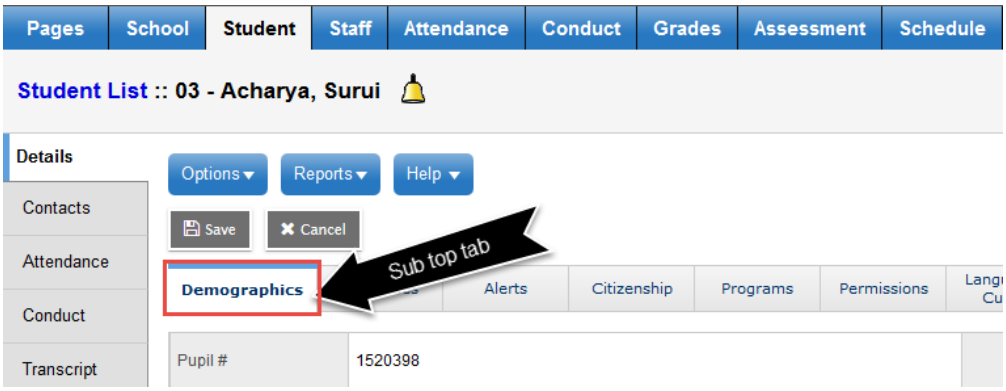


3.2 Sub-side Tabs, Sub-top Tabs and Leaves

Side tabs usually contain **sub-side tabs, leaves** and **sub-top tabs.**



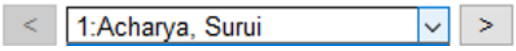
Sub-top tabs display at the top of a list, when a side tab is selected.



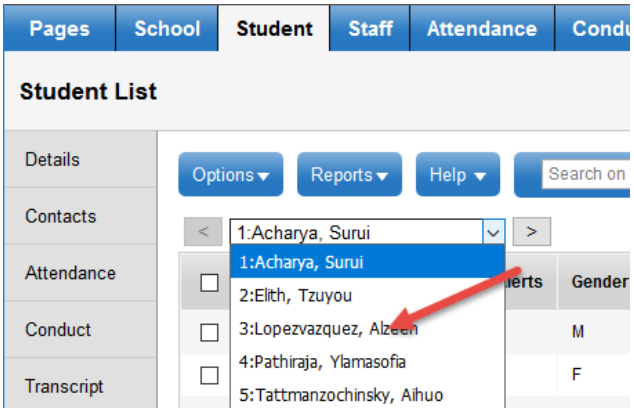
3.3 Page selector

This navigation tool allows the user to select a range of records. The tool displays by default at the top of the list of data, and will display at the bottom of the list as well if the preference to *Show lower page controls* has been set.

Use the drop-down arrow to select a page in the list, or the back and forth arrows at either side to move through the pages consecutively.

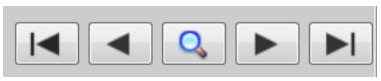


In the drop down menu, the first record on each page is indicated. The number of records that display on each page is determined by the user preference setting *Records per page*.



3.4 Record Navigation Bar

The *Record Navigation Bar* can be used to change the record being viewed.



For example, if the user is in the **Student** top tab > **Details** side tab, only one student is displayed. The user can:

- Use the in the record navigation bar to search for a new student without returning to the student list.
- Use the forward and back arrows on the record navigation bar to move to the next consecutive record.
- Use the first and last record buttons to move to the first record in the page selector or to the last record in the page selector.

3.5 Search Tool

The search tool is present throughout the application to provide the ability to search the values in a field set or pop-up list. The user can enter the search criteria. The search is conducted on the first column of information in the field set, **or** the column of data that represents the primary sort. Clicking on a column header will sort the data on that column, and the search function will work on the selected column. The Search tool indicates which column the search is using with a *Search on …* prompt before text is entered in the field.

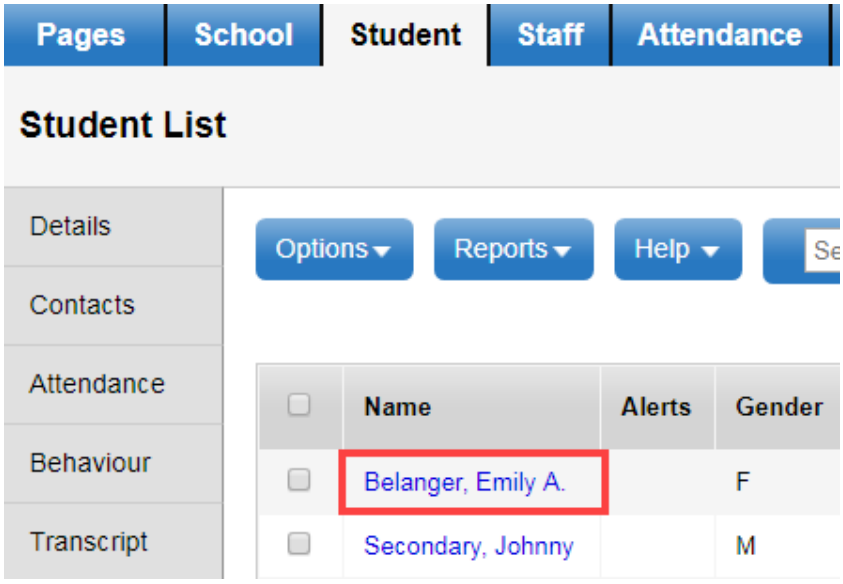
Filters determine the students included in the search. For example, if the filter is set to Primary Active Students in the student list, the search will not return results for a student who is a secondary student. For details on Filters see the Filters section.

Results are returned with the closest match the system can make. The closest match record will be selected in the list.

1. Enter the value to search for in the search field.
2. Click the magnifying glass or the enter key to execute the search.

3.6 Hyperlinks

Hyperlinks are in blue lettering and an underscore displays when the user hovers over them with a mouse. Clicking on a hyperlink will take the user to the details of that particular record.



3.7 Breadcrumbs

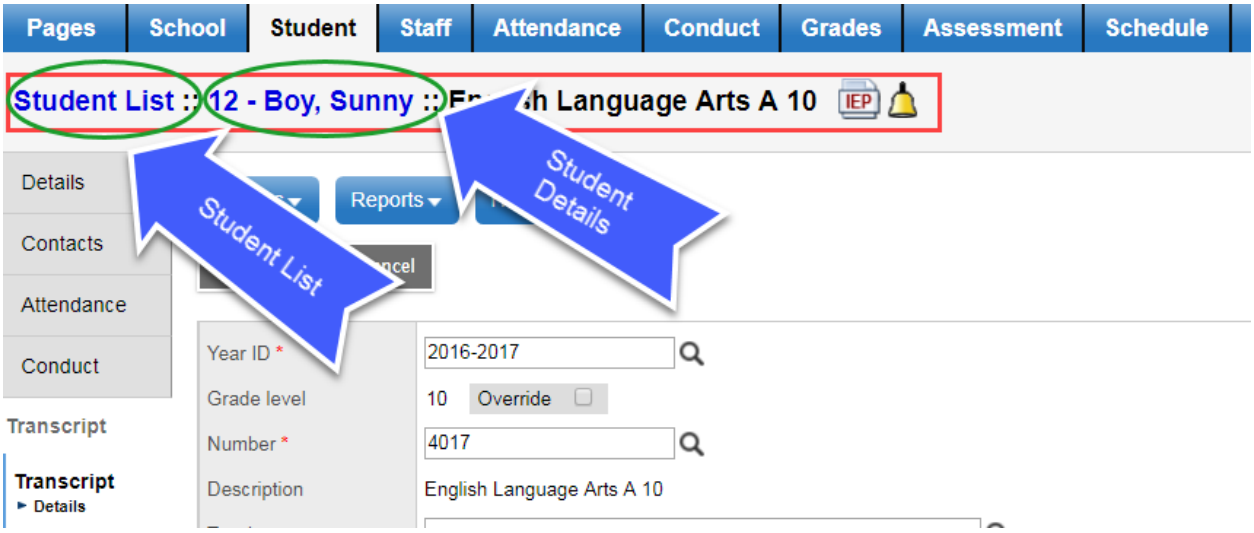
When a user has selected a record and is viewing the details, a *breadcrumb* trail will appear at the top of the list to indicate the path used to arrive at that location. The breadcrumb presents with blue hyperlinks, clicking on any of the hyperlinks within the breadcrumb will return the user to that location.

In the example below, the user is viewing student transcript record for a sample student in the **School** view.

The user arrived at this screen by following this path: **Student > Transcript > Details.** The steps to follow the path are:

- Click the **Student** top tab
- Select the checkbox next to the student name in the **Student List**
- Click the **Transcript** side tab
- Click the **Details** leaf (or click into the blue hyperlink on the transcript record)

The user can return to the *Student Details* by clicking on the **Student Name** in the breadcrumb trail, or return to the *Student List* by clicking on **Student List** in the breadcrumb trail.



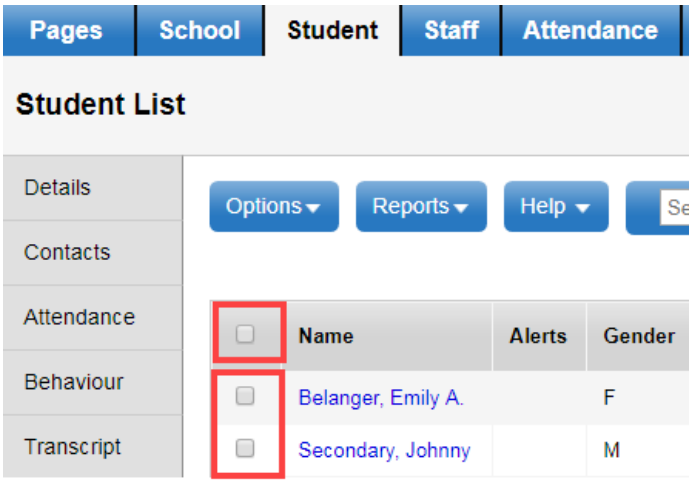
3.8 Checkboxes vs Radio Buttons

There are many selection lists throughout MySchoolSask. If a list shows round radio buttons, it indicates that only one record can be selected. If a list shows square checkboxes, then multiple records can be selected.

3.8.1 Checkboxes

A sample of the Checkboxes are found on the Student list:

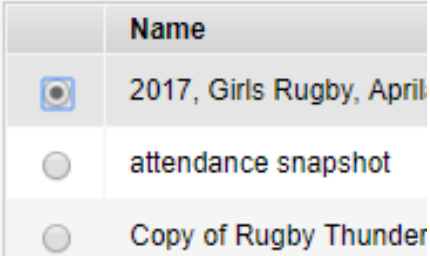
- More than one student can be selected at a time using the checkboxes in front of their names. Checking the checkbox at the top of the list will select all of the records visible on the page.



3.8.2 Radio Buttons

A sample of Radio Buttons is found in Student > Options menu > Snapshots:

- Only one snapshot can be selected because there are radio buttons in front of them.



3.9 Clearing Record Selections

When multiple records have been selected in a list, a user may clear them using one of the following options:

- Manually uncheck the box in front of a record. This will de-select an individual record.
- Use the icon at the top of the list of selected records. This will clear ALL selections.
- Changing the filter to generate a new list.
- Leaving the top tab to navigate to another area of the application. This is only true if the user is on the main list and has not performed an Options > Show Selected on the records.
- Logging out of MySchoolSask.

4.0 Icons and Alerts

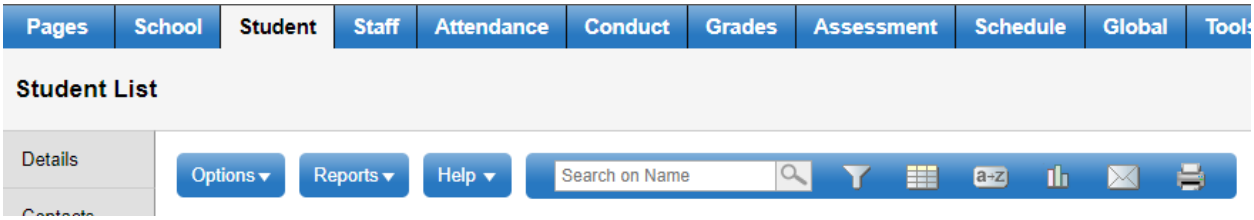
MySchoolSask will display a number of icons throughout the application to indicate additional information or alert information. Hovering over these icons will provide a tool tip that displays what type of information the icon contains. Clicking on the icon will generate additional information. These icons include:

- **Medical and health alerts**: ,
- **Legal alerts:**
- **Other alerts:**
- **Quick Status for locating a student:**
- **Student Services alerts:** ,
- **Informational alerts:**

Information on maintaining student alerts is included in the Enrollment Management and Student Demographics and Student Services documentation.

5.0 Menu Bar Buttons

The menu bar buttons display just below the top tabs in MySchoolSask. The menu bar buttons are the same regardless of the top tab the user selects, and the list of items in the list display based on the screen.

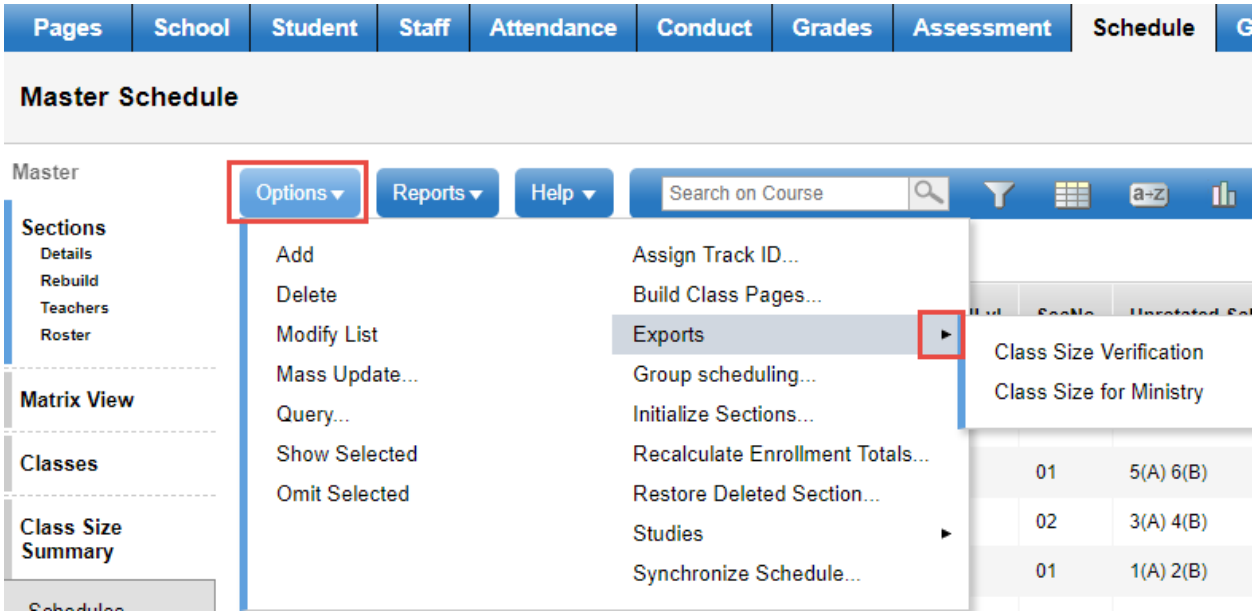


The items displayed in the dropdowns of the menu will change, depending on the top tab *and* side tab the user has selected.

The various tools in the menu bar are described in the following sections.

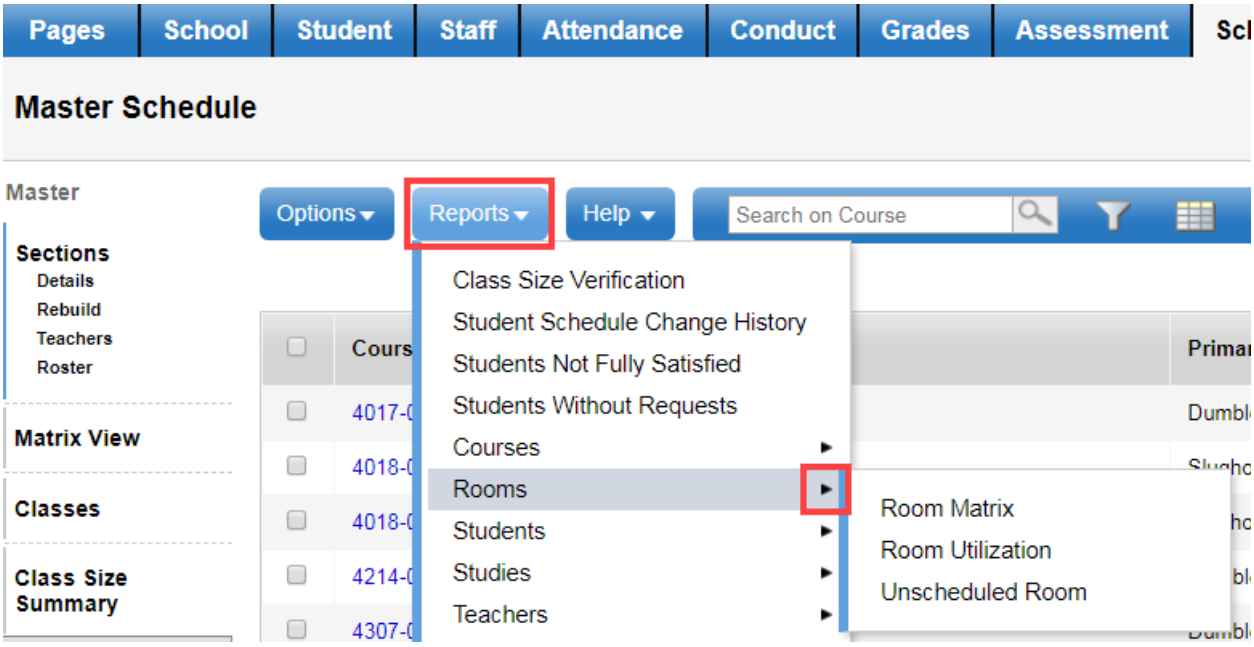
5.1 Options

The **Options** menu is an action centre where a user can initiate actions on the data that is displayed on the screen. The Options list may include items with an arrow, indicating a fly out menu with additional options.

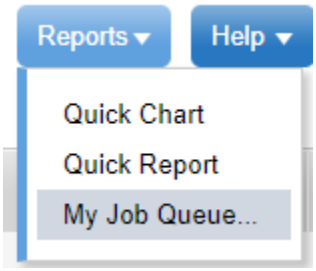


5.2 Reports

The Reports button displays a list of reports available. This list is based on the top tab, side tab and leaf currently selected. For example: When in *School* > *Student* > *List* the Reports button provides a number of reports related to student demographics which can be printed for multiple students. When in *School* > *Schedule* > *Master* > *Sections* the Reports button provides a list of reports related to scheduling and course sections. The Reports list may include items with an arrow, indicating a fly out menu with additional reports.



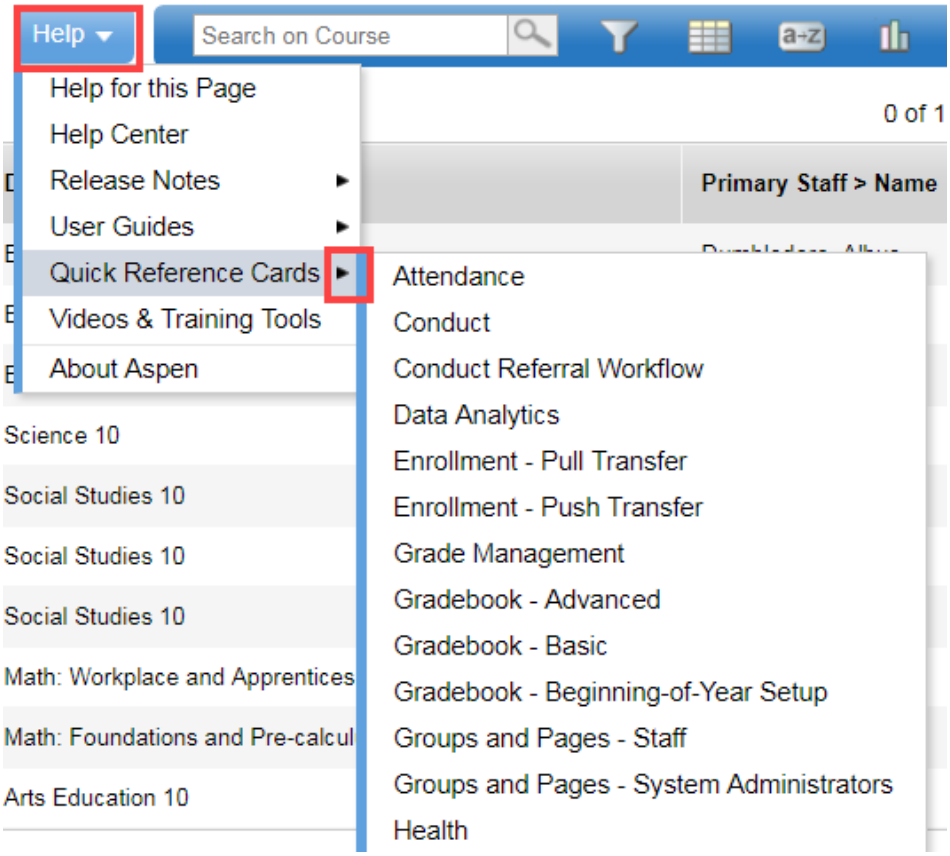
The My Job Queue item in the Reports list will present a window that shows reports the user has run and the report status. So it is not necessary to wait for a report to finish once Run has been selected. The report can be retrieved later from My Job Queue.



5.3 Help

The Help button provides several options for online instructions and tools that are core to the Follett product. The Help list may include items with an arrow, indicating a fly out menu with additional tools.

Note: The tools in the Help menu are not customized for MySchoolSask, and may reference options or functions that are not available to Division and School users.



5.3.1 **On-line help**

On-line help opens in a new window and provides a variety of ways to search for information using the options on the left side of the screen.

The On-line help functionality identifies where the user is when they select the help button and directs them to information related to that top and side tab. For example: If the user is in *School* > *Student* > *Membership* and selects the On-line Help option, they are directed to *Working With Student Enrollment Information* in the online guide.

The information in the On-line help is not customized for MySchoolSask, and may reference options or functions that are not available.

5.3.2 **Release Notes**

Release notes will provide information about the latest changes to the software product. This information refers to the Follett application as a whole; it is not customized for MySchoolSask. The release notes may reference options or functions that are not available.

5.3.3 **User Guides**

User guides open up as documents with hyperlinks in the table of contents. These guides are not customized for MySchoolSask.

5.3.4 Quick Reference Cards

Quick reference cards are short, task-specific reference documents. These cards are not customized to MySchoolSask.

5.3.5 Videos & Training Tools

This area of the Help menu provide Lesson Plans, Quick Reference Guides and Videos. Clicking on a category will display all of the options within that category. These tools are not customized for MySchoolSask and may reference options or functions that are not available.

6.0 Queries

A query is *dynamic*. A query performs a new search and displays current information each time the query is run. For example, the list of students assigned to a homeroom may be different today than it was yesterday because a new student enrolled and was assigned to the homeroom.

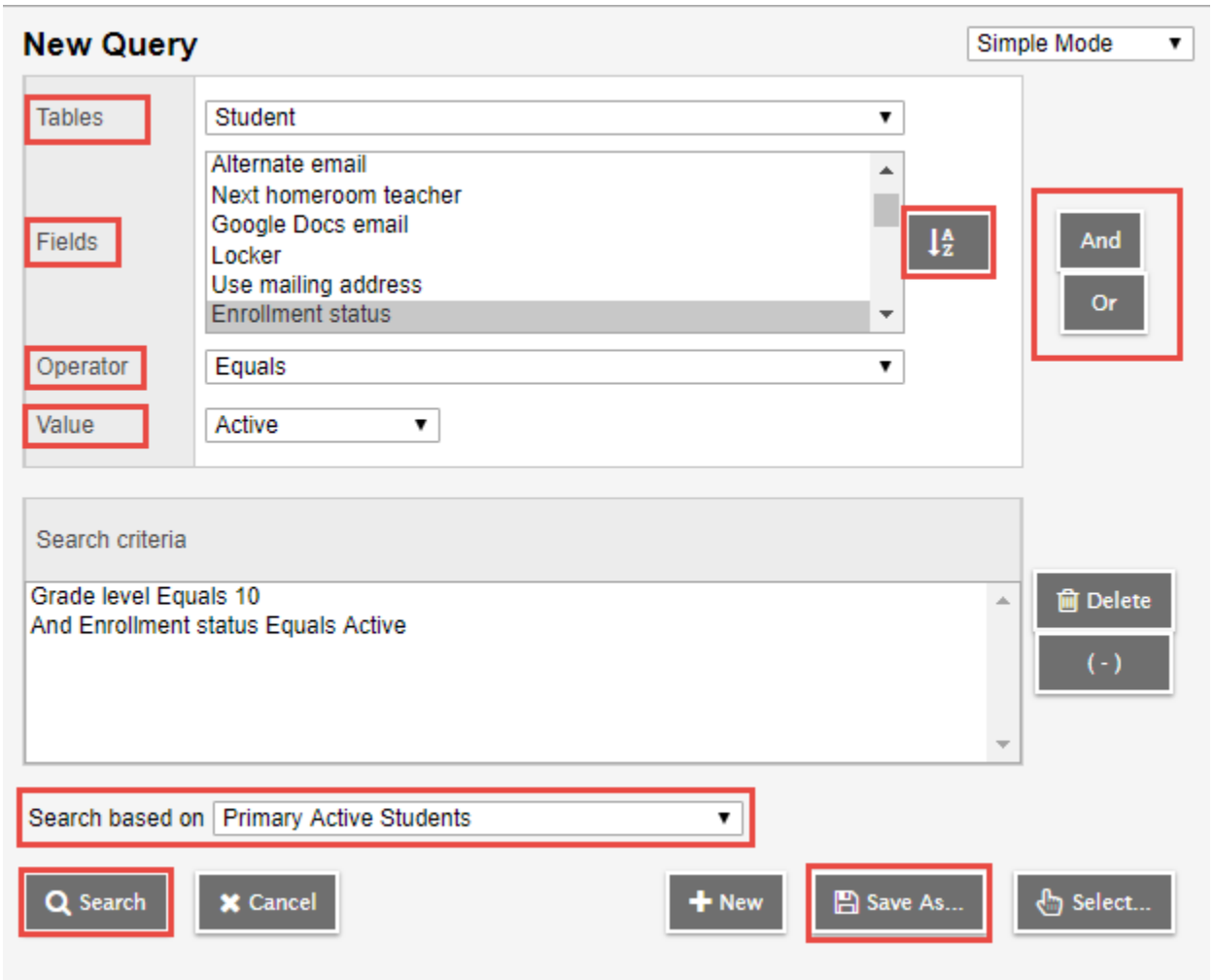
6.1 Create a Simple Query

1. In the **Options** menu, select **Query**.
2. In the *New Query* window, use the following table to select appropriate fields:

Fields	Descriptions
Tables	Select the table where the search information resides. The selected table determines the selections in the Fields area. For example, if the Student table is selected, fields in the student details appear.
Fields	At Fields, select the field to be included in the search criteria. Note: Fields within each reference table are listed from most commonly used to least commonly used. To change this order to alphabetical, click the Alpha Sort button a→z
Operator	Select an appropriate operator. For example, if the search is for students with a specific year of graduation, select Year of graduation in the Fields box, and select the Equals operator.
Value	Enter the search value. In some cases, this may be a pick list or drop down menu.

3. Click **Add** to add the criteria to the Search criteria box. To add other criteria, select the **Table**, **Field**, and **Operator**, and enter the Value, if appropriate.
4. Click **And** or **Or** to determine if the students should meet the first criteria, the second criteria, or both to be included in the search.
5. Confirm the correct search criteria are displayed in the Search criteria box. To delete the criteria from this search, highlight it in the Search criteria box and click **Delete**.
6. In the **Search based on** field, use the drop-down to select which students should be included in the search.
7. Click the **Search** button to execute the search.

Once a query has been executed, the records matching the search criteria will be displayed on the screen. The upper right corner of the screen, above the list, will indicate that the records displayed are a custom selection. Use the icon to return the list to all records or another selection.



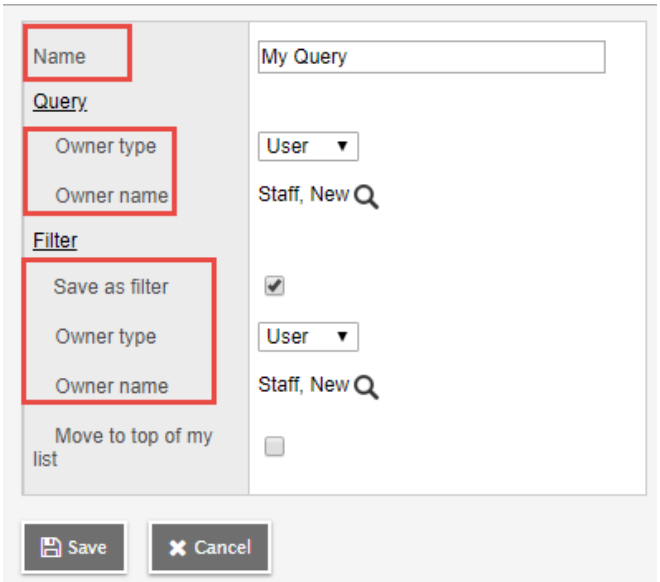
6.2 Save a Query

If a query will be used frequently, it can be saved for quick retrieval.

1. Create a query using the instructions above.
2. Click **Save as. . .** The *Save as* dialogue box displays.
    a. **Name:** Give the query a name that will make sense later. If it will be saved as a filter, it is best to keep the name concise.
    b. **Owner type:** Click the drop-down to select one of the following:
        - **User**: to give an individual user access to the query.
        - **School**: to give users at a school access to the query. User must have access to the school view to use this option.
        - **Division**: to give all users in a Division access to the query. User must have access to the Division view to use this option.

c. **Owner Name**: click the magnifying glass to change the owner of the query. The owner can edit a saved query.
d. **Save as filter**: Select this checkbox to have this query automatically appear on the menu for all users who have access to it. If this checkbox is selected, the next three fields are accessible.
e. **Filter Owner type:** Click the drop-down to select the owner type as appropriate. These options are defined the same as the **Query Owner Type** options.
f. **Filter Owner name:** click the magnifying glass to change the owner of the query. The owner can edit a saved filter.
g. **Move to the top of my list**: Checking this box will place the query at the top of the menu. If a query is first on the filter menu, it becomes the default filter for that screen.

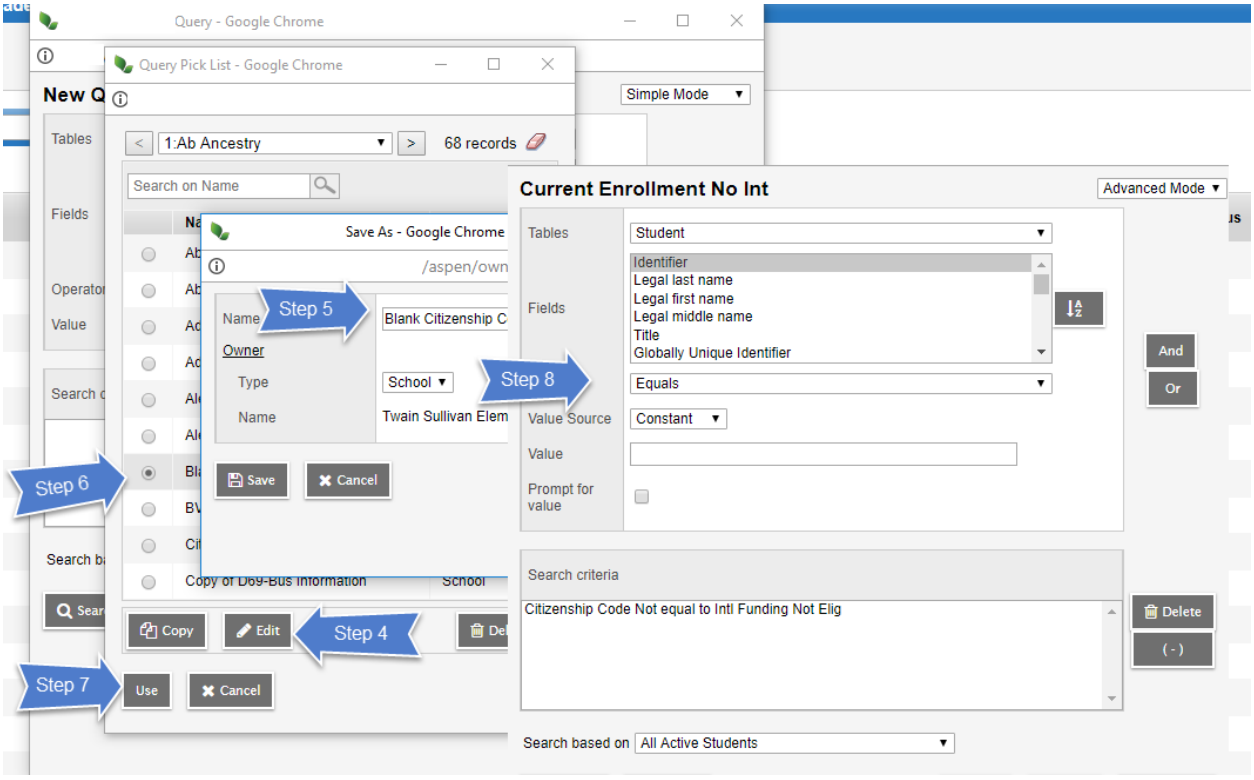
3. Click **Save.**



6.3 Edit a Query

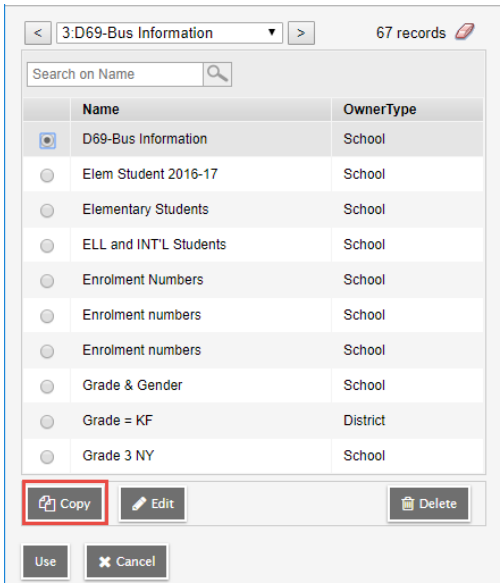
Users must have the appropriate permissions to edit the query.

1. In the **Options** menu, select **Query.**
2. In the *New Query* pop-up window, click the **Select** button. A list will pop up with all the queries.
3. Click the radio button beside the query to be edited.
4. Click **Edit**.
5. Adjust the **Name** and **Owner** fields, if necessary.
6. Click **Save.**
7. Ensure the query is still selected and click **Use.**
8. Adjust search criteria as necessary.
9. Click **Save**.



6.4 Copy a Query

Users can copy a query that contains elements they want and adjust it to suit their need.



1. In the **Options** menu, select **Query.**
2. In the *New Query* pop-up window, click the **Select** button. A list will pop up with all the queries.
3. Click the radio button beside the query to be copied.
4. Click **Copy**.
5. Give the new query a **Name** and **Owner** type.

6. Click **Save.**
7. Ensure the query is still selected and click **Use.**
8. Adjust search criteria as necessary.
9. Click **Save**.

6.5 Delete a Query

If a query has become obsolete, it can be deleted

1. In the **Options** menu, select **Query.**
2. In the *New Query* pop-up window, click the **Select** button. A list of queries will pop up.
3. Click the radio button beside the query to be deleted.
4. Click **Delete**.
5. Click **Cancel** to close the query list popup.
6. Click **Cancel** to close the *New Query* window.

7.0 Snapshots

A snapshot is different from a filter. Where a filter is dynamic and always returns the latest data, a snapshot is a static list. It always displays the same records unless it is manually edited. Only the user who created the snapshot can add or remove students from it.

7.1 Creating and Deleting Snapshots

7.1.1 Create a Snapshot

1. In the **School** view, click the **Student** top tab. Select the records to be included in the snapshot.

2. If records have been manually selected in a large list, be sure to go to the **Options** menu and click **Show Selected**. Users can also use a filter or query to isolate the records for a snapshot. Snapshots will include any records that appear on the current list.

3. In the **Options** menu, select **Snapshots.**
4. In the pop-up window, click the **New** button.
   a. **Name:** Give the snapshot a name that represents the data in the snapshot.
   b. **Owner:** Who will see and use this snapshot? If the user has Division or school access, they have the ability to set this to all users with those views. If the user sees no other option, they are creating a user snapshot.
   c. **Save as filter:** If this is selected, the snapshot will appear in the filter menu under the icon.
   d. **Move to the top of my list**: If this is selected the snapshot will appear as the first item in the filter menu and will become the default filter for that screen.
5. In the **Records to Include** box, select one of the following:

a. **Current List**: includes records selected on the list page.

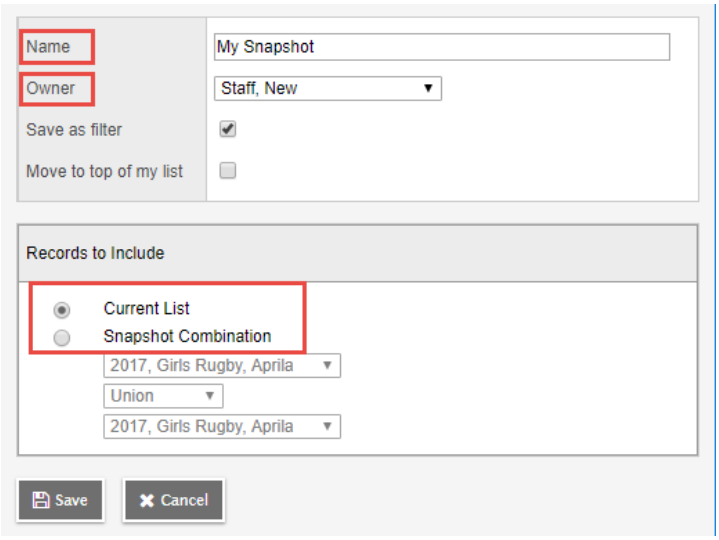
b. **Snapshot Combination**: this will combine two existing snapshots and is only available if two or more snapshots have already been defined. This provides 3 options:

   i. **Union**: Any records that appear in the first snapshot selected ***or*** the second snapshot selected. For example, for a snapshot of students who are in grade 12 **or** have a program of study, select **Union**.

   ii. **Intersection**: Only records that appear in both the first ***and*** the second snapshots selected. For example, for a snapshot of students who are both in grade 12 **and** have a program of study, select **Intersection**.

   iii. **Difference**: Any record that displays in the first snapshot selected, but not in the second. For example, for a snapshot of students who are in grade 12 but do not have a program of study, select **Difference**.

6. Click **Save**.



7.1.2 Remove a Snapshot from the Filter Menu

If a snapshot was saved as a filter in error, or is no longer needed as a filter, it can be removed from the filter menu.

1. Click on the icon and select **Manage Filters**.
2. In the *Manage Filters* window, click on the snapshot so it is highlighted.
3. Click the **Delete** button.
4. Click **Close**.

<u>Note</u>: Deleting the filter does not delete the snapshot behind it. The filter can be restored by creating a new filter and selecting the snapshot.

7.1.3 Delete a Snapshot

If a snapshot has become obsolete, it can be deleted from the snapshot menu.

1. In the **Options** menu, select **Snapshots**.

2. Select the snapshot to be deleted.
3. Click **Delete.** Note that it warns the user that any filter associated with the snapshot will be deleted.
4. Click **OK.**

7.2 Add a Snapshot to a Student

Snapshots are static lists and will not update automatically when a new student meets the criteria the snapshot was based on.

7.2.1 To add a snapshot to a student:

1. In the **Student** top tab, select the student to be included in the snapshot.
2. Click the **Snapshots** side tab.
3. In the **Options** menu, select **Add.**
4. Select the snapshot from the list.
5. Click **OK.**

7.3 Remove a Snapshot from a Student

If a student no longer meets the criteria for the snapshot, a user may want to delete them from that snapshot.

7.3.1 To remove a snapshot from a student.

1. In the **Options** menu, select **Snapshots**.
2. Select the snapshot to be modified. Click **Use**. The list of students in the snapshot will appear.
3. Check the box beside the student(s) to be removed from the snapshot.
4. Click the **Snapshots** side tab.
5. In the **Options** menu, select **Delete.**
6. Click **OK.**

8.0 Menu Bar Tools

The menu bar provides several tools for filtering, displaying, sorting and exporting data in MySchoolSask. The menu tools are the same regardless of the top tab the user has selected, with the exception of the quick letter function on the Student top tab. The options that display when using these tools will vary depending on the top tab and side tabs selected.

8.1 Filters

The Filter functionality is used to determine the records that display on a page. Selecting the Filter icon displays a list of filters currently available to the user. This list is based on the top tab, side tab and leaf currently selected, as well as the security role(s) assigned to the user.

Filters are built from queries that provide a real time list of the students meeting the criteria defined in the query. For example: The Filter Homeroom = ? returns all the current students with the selected homeroom assigned. If a new student is assigned to the selected homeroom, they will immediately display in the filter list.

Filters can be created at the Division, School or individual user level.

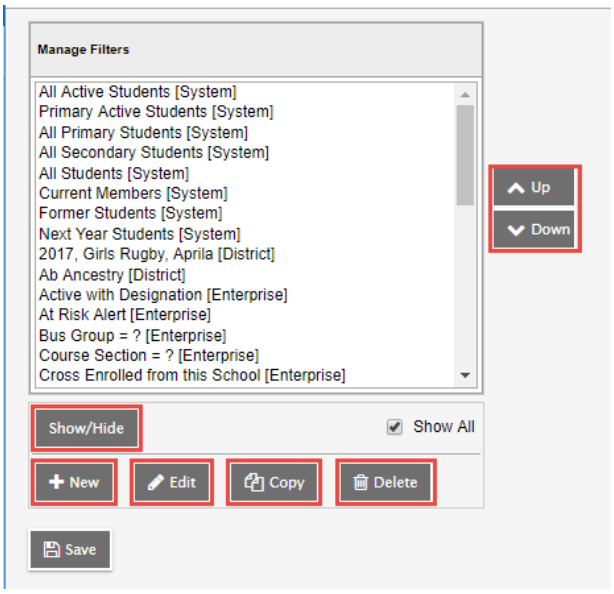
System Filter	Description
All Active Students	Primary Active, Active No Primary and Secondary Active Students
Primary Active Students	Primary students with a status of Active or Active No Primary.
All Primary Students	All Primary students for which this school is or was the last school of record, regardless of the current student Enrollment Status.
All Secondary Students	Students that have a secondary school association to this school, with a status of Active or Active No Primary.
All Students	All Primary students for which this school is or was the last school of record, regardless of the current student Enrollment Status, Active No Primary and Secondary students.
Current Members	All students with current admission dates, including students with secondary school associations that have a current start date. This filter does not include students with a future admission date, or students with future secondary school association start dates.
Former Students	Students who were withdrawn, but have a former school association to this school. If this association record is deleted, the student will no longer appear in the filter.
Next Year Students	Students with a Next School value field populated with the name of this school.

The filters that appear in the list have been created at the system, enterprise or Division level.

Click the icon and select **Manage Filters.** In the *Manage Filters* pop-up window, users see the following in brackets beside the name of the filters:

a. **System**: these filters are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
b. **Enterprise**: these filters have been created at the enterprise level and display for all Divisions and schools. They can be hidden or moved up or down in the list, but cannot be modified.

c. **Division**: these filters have been created at the Division level for the Division level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the Division view.
d. **School**: these filters have been created either by a school user, or by a Division user in the school view. They are visible to all users with access to the School view. These filters can only be modified or deleted by a school user or a Division user with school view access.
e. **User**: these filters have been created by an individual user. They will only show in the list for the user who created them and therefore can only be modified or deleted by the user who created them.



8.1.1 Set a Default Filter

A user can set the filter they use most often as the default for that screen by moving it to the top of the list.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be moved. It will be highlighted.
3. Click the Up or Down buttons to position the filter in the list. The filter at the very top of the list is the default filter when entering that screen.
4. Several filters can be moved at once by using Shift + click and using the Up or Down buttons.
5. Click **Close.**

8.1.2 Hide a Filter

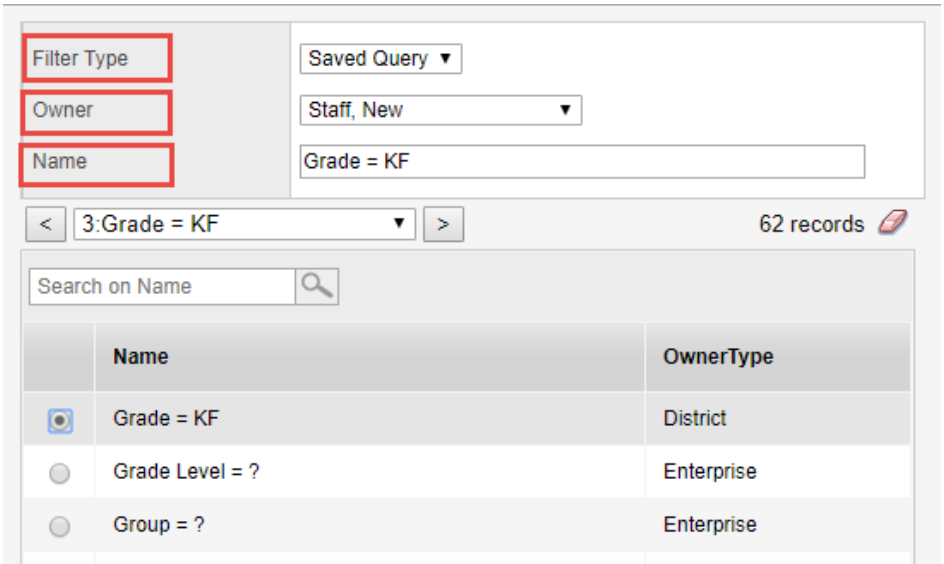
1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be hidden. It will be highlighted.

3. Click the Show/Hide button. If the **Show All** box is checked, the filter will still appear here, but is now greyed out. This means the filter will no longer appear in the list when the icon is clicked. The item can be restored at any time by clicking the Show/Hide button to put it back in the list. If the **Show All** box is not checked, the filters which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden filter.
4. Click **Close**.

8.1.3 Create a New Filter

Filters are connected to queries and snapshots. Users can access those queries and create them as a filter by using the **New** button in the *Manage Filters* window.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click the New button. A list of available queries will appear.
   a. **Filter Type**: This allows a filter to be created from an existing query or snapshot. Changing this selection will change the list of options below.
   b. **Owner:** Who will see and use this filter? If the user has Division or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.
   c. **Name:** Give the filter a name that makes sense for its function.
3. Click the radio button beside the query or snapshot in the list that the filter will be based on.
4. Click **OK**. The filter will now appear in the Manage Filters window and in the list below the icon for this screen.
5. Click **Close** on the *Manage Filters* window.

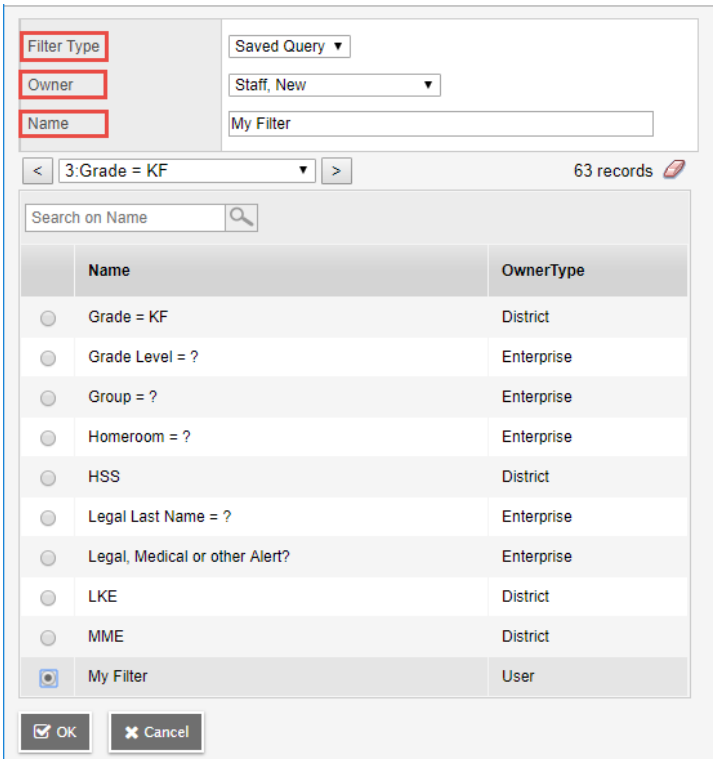


8.1.4 Edit a Filter

A user can only edit a filter that exists at the level of their user role view. In other words, a Division user who has access to both Division and school views can edit a *Division* or *School*

filter. A school user can edit a *School* filter because they have school view access. A user with staff view will only be able to edit their own *User* filters.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click the Edit button.
3. In the pop-up window:
    a. **Filter Type**: This allows a filter to be changed from its current query or snapshot, to a new query or snapshot. Changing this selection will change the list of options below.
    b. **Owner:** Who will see and use this filter? If the user has Division or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.
    c. **Name:** Give the filter a name that makes sense for its function.
4. Click **OK.**
5. Click **Close** on the *Manage Filters window.*



8.1.5 Copy a Filter

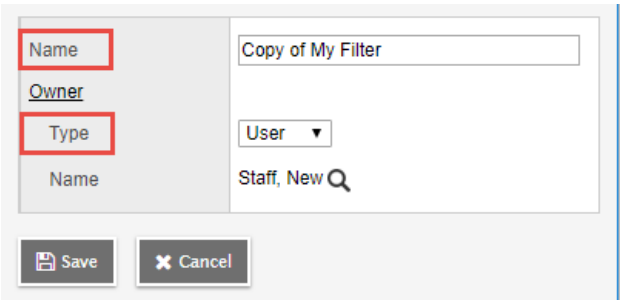
Because a filter is connected to a query or a snapshot, there are few reasons to copy a filter. A user may decide to copy a filter in order to rename it to something that is more meaningful.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be copied. It will be highlighted. Click on the Copy button.
3. In the pop-up window:
    a. **Name:** Give the filter a name that makes sense for its function.

b. **Owner:** Who will see and use this filter? If the user has Division or school access, they will have the ability to set this filter for all users with those views. If the user sees no other selection, they are creating a User filter.

4. Click **Save.**
5. Click **Close** on the *Manage Filters* window.

If a filter has been copied, it may be practical to hide or delete the original to avoid confusion.



8.1.6 Delete a Filter

A user can only delete a filter that exists at the level of their user role view. In other words, a Division user who has access to both Division and school views can delete a *Division* or *School* filter. A school user can delete a *School* filter because they have school view access. A user with staff view will only be able to delete their own *User* filters.

1. Click the icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, click on the name of the filter to be deleted. It will be highlighted.
3. Click the Delete button.
4. Click **Close** on the *Manage Filters window*.

Deleting a filter does not delete the query behind it. If a filter is deleted in error, it can be restored by using the **Add** button.

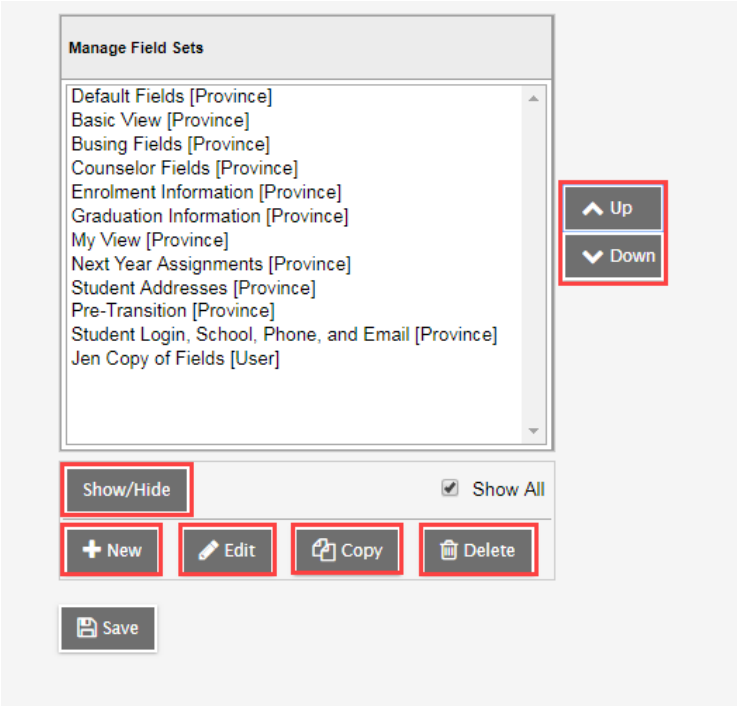
8.2 Field Sets

Field sets display information in a list. By selecting a different field set, the user is choosing to display different columns of information for the same records in the list. Field sets are useful for grouping commonly used sets of information and then extracting those into a spreadsheet for analysis or manipulation.

The field sets that display in the list have been created at the Enterprise level or have been created by Division users who may have created them for their schools.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, users may see the following in brackets beside the name of the field sets:
   a. **System**: these field sets are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.

b. **Enterprise**: these field sets have been created at the enterprise level and display for all Divisions and schools. They can be hidden or moved up or down in the list, but cannot be modified.
c. **Division**: these field sets have been created at the Division level for the Division level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the Division view.
d. **School**: these field sets have been created either by a school user, or been created by a Division user in the school view. They will be visible to all users who have access to the School view. These field sets can only be modified or deleted by a school user or a Division user with school view access.
e. **User**: these field sets have been created by an individual user.



8.2.1 Move a Field set

A user can set a field set they use the most as the default in that screen by moving it to the top of the list.

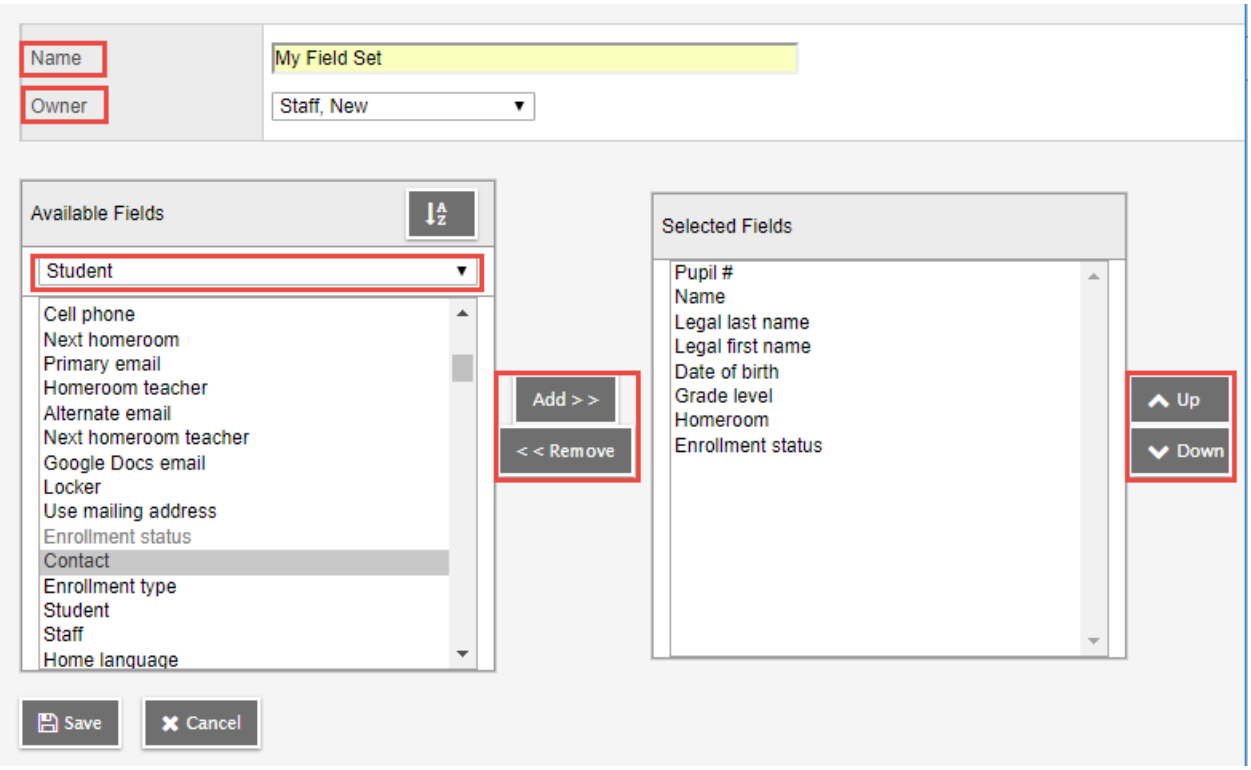
1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be moved. It will be highlighted.
3. Click the Up or Down buttons to position the field set in the list. Any field set placed at the very top of the list will become the default field set when entering the screen.
4. Several field sets can be moved at once by using Shift + click and using the Up or Down buttons.
5. Click **Close.**

8.2.2 Hide a Field Set

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be hidden. It will be highlighted.
3. Click the Show/Hide button. If the **Show All** box is checked, the field set will still display here, but is now greyed out. This means the field set will no longer appear in the list when the icon is clicked. The item can be restored at any time by clicking the Show/Hide button to put it back in the list. If the **Show All** box is not checked, the field sets which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden field set.
4. Click **Close**.

8.2.3 Create a New Field Set

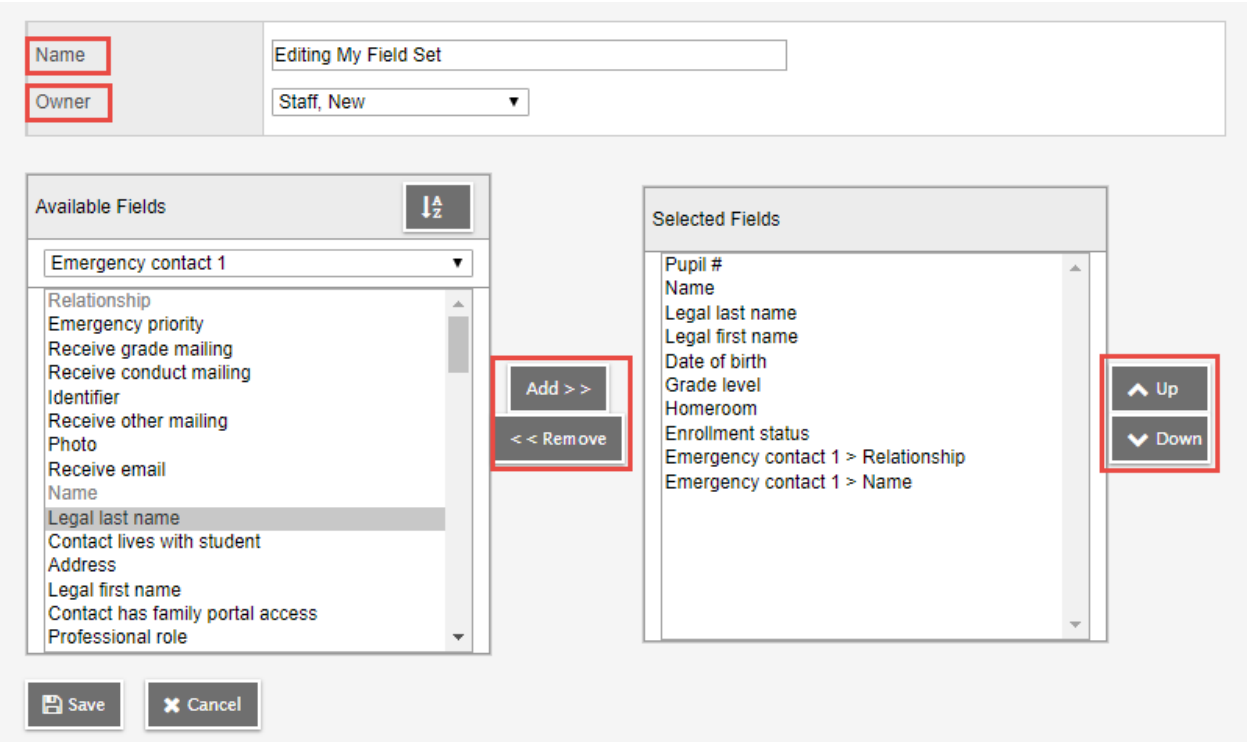
1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click the New button.
3. In the pop-up window:
   a. **Name**: Give the field set a name that makes sense for its data set.
   b. **Owner**: Who will see and use this field set? If the user has Division or school access, they will have the ability to set this field set for all users with those views. If the user sees no other option, they are creating a User field set.
   c. In the **Available Fields** window, use the drop-down menu to select the table from containing the desired data fields. These are listed in the order most frequently used. If the user is having trouble finding a field, use the Sort A-Z button to sort them into alphabetical order.
   d. Click on the desired field to select so it is highlighted in the list.
   e. Click the Add > > button. This will move the field into the **Selected Fields** window.
   Note: Multiple fields from multiple tables can be selected for the same field set.
4. Once all fields have been selected, click **Save**.
5. Click **Close** on the *Manage Field Sets* window. The field set will now appear in the list for selection.



8.2.4 **Edit a Field set**

A user can only edit a field set that exists at the level of their user role view. In other words, a Division user who has access to both Division and school views can edit a *Division* or *School* field set. A school user can edit a *School* field set because they have school view access. A user that only has staff view will only be able to edit their own *User* field sets.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be edited. It will be highlighted.
3. Click the Edit button.
4. In the pop-up window:
   a. **Name**: Enter the new name for the field set, if appropriate.
   b. **Owner:** Who will see and use this field set? If the user has Division or school access, they will have the ability to set this field set for all users with those views. If the user sees no other selection, they are creating a User field set.
5. In the *Available Fields* window, click the fields of information to add to the field set. Click the Add > > button. Alternatively, in the *Selected Fields* window, click the fields of information to be removed from the field set. Click the < < Remove button.
6. Click **Save**.
7. Click **Close** on the *Manage Field sets* window.

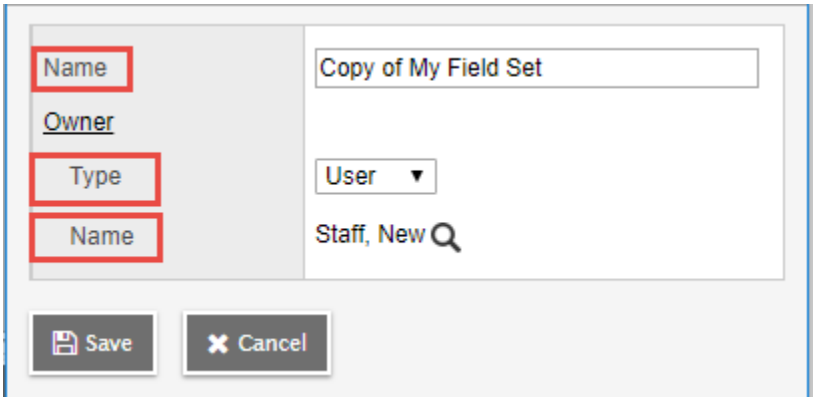


8.2.5 **Copy a Field set**

A user may see a field set in the list that suits their needs, but would like to add or remove some information from it. If the user does not own the field set, a copy can be made and adjusted to suit the need.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be copied. It will be highlighted.
3. Click the Copy button.
4. In the pop-up window:
    a. **Name:** Give the field set a name that makes sense for its data set.
    b. **Owner:** Who will see and use this field set? If the user has Division or school access, they will have the ability to set this field set for all users with those views. If the user sees no other selection, they are creating a User field set.
5. Click **Save.**
6. Click **Close** on the *Manage Field sets* window.

If a field set has been copied, the user may want to consider hiding or deleting the original to avoid confusion or duplication in the field set list.



8.2.6 Delete a Field Set

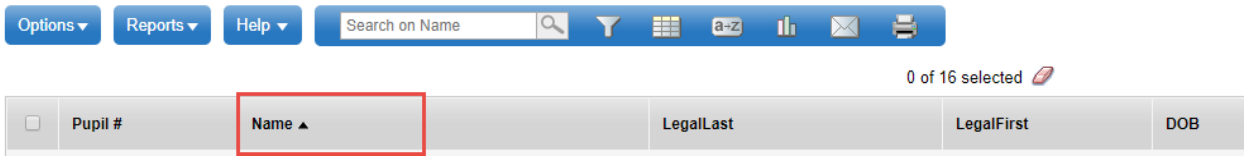
A user can only delete a field set that exists at the level of their user role view. In other words, a Division user who has access to both Division and school views can delete a *Division* or *School* field set. A school user can delete a *School* field set because they have school view access. A user that only has staff view will only be able to delete their own *User* field sets.

1. Click the icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be deleted. It will be highlighted.
3. Click the Delete button.
4. Click **Close** on the *Manage Field Sets* window.

8.3 Sorts

There are different ways to sort data in a field set, which are defined below. The options for sorting data in a field set are:

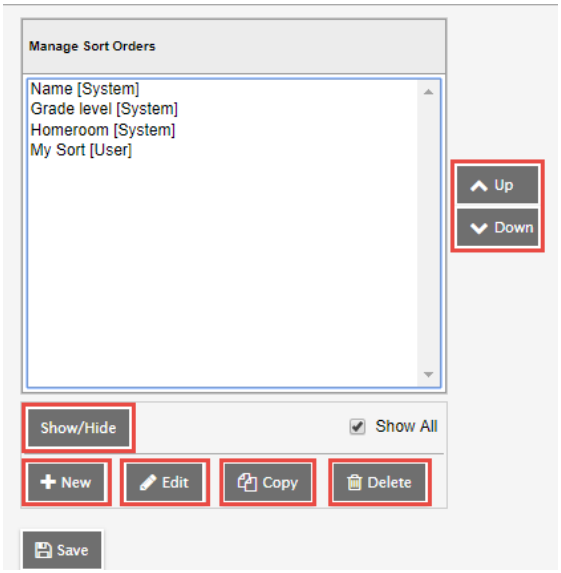
- Click the header of a column of data, a triangle displays pointing up or down in the column header to indicate the sort column and order. The field set sorts by the data in that column, opposite to its original sort order. Clicking the header again sorts the data back to its original order. This function can be used for multi-level sorts of up to three columns of data at a time. For example: clicking the *Gender* column in the **Student** top tab, then clicking the *Pupil #* column, then the *Grade* column, the grade would be the primary sort. Data displayed will be in order by *Grade*, then by *Pupil #*, then by *Gender*.



- Use the icon, which simply sorts the data in the field set by the list value chosen for the sort. The sort icon can also be used to set any sort back to the default.

The field sets that appear in the list already have been created at the Enterprise level or by Division users who may have created field sets for their own schools.

1. Click the a→z icon and select **Manage Sort Orders. . .**
2. In the *Manage Sort Orders* pop-up window, the following will appear in brackets beside the name of the field sets:
    a. **System**: these sort orders are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
    b. **Enterprise**: these sort orders have been created at the enterprise level and appear for all Divisions and schools. They can be hidden or moved up or down in the list, but cannot be modified.
    c. **Division**: these sort orders have been created at the Division level for the Division level views. They can be hidden or moved up or down in the list, but cannot be modified unless the user has access to the Division view.
    d. **School**: these sort orders have been created either by a school user, or been created by a Division user in the school view. They will be visible to all users who have access to the School view. These sort orders can only be modified or deleted by a school user or a Division user with school view access.



8.3.1 Move a sort order

A user can set the sort order they use the most as the default in that screen by moving it to the top of the list. Users can also create custom sorts.

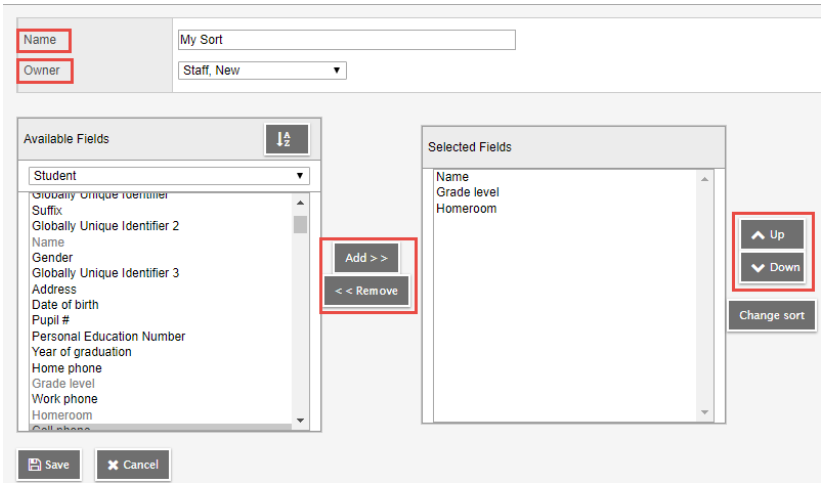
1. Click the a→z icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be moved. It will be highlighted.
3. Click the Up or Down buttons to position the field set in the list. Any sort order placed at the very top of the list will become the default sort order when entering the screen.
4. Several sort orders can be moved at once by using Shift + click and using the Up or Down buttons.
5. Click **Close.**

8.3.2 Hide a Sort Order

1. Click the a→z icon and select **Manage Sort orders . . .**
2. In the *Manage Sort orders* pop-up window, click on the name of the sort order to be hidden. It will be highlighted.
3. Click the Show/Hide button. If the **Show All** box is checked, the sort order will still appear here, but is now greyed out. This means the sort order will no longer appear in the list when the a→z icon is clicked. The item can be restored at any time by clicking the Show/Hide button to put it back in the list. If the **Show All** box is not checked, the sort orders which have been hidden will no longer be visible. This checkbox will need to be enabled in order to restore a hidden sort order.
4. Click **Close**.

8.3.3 Create a New Sort Order

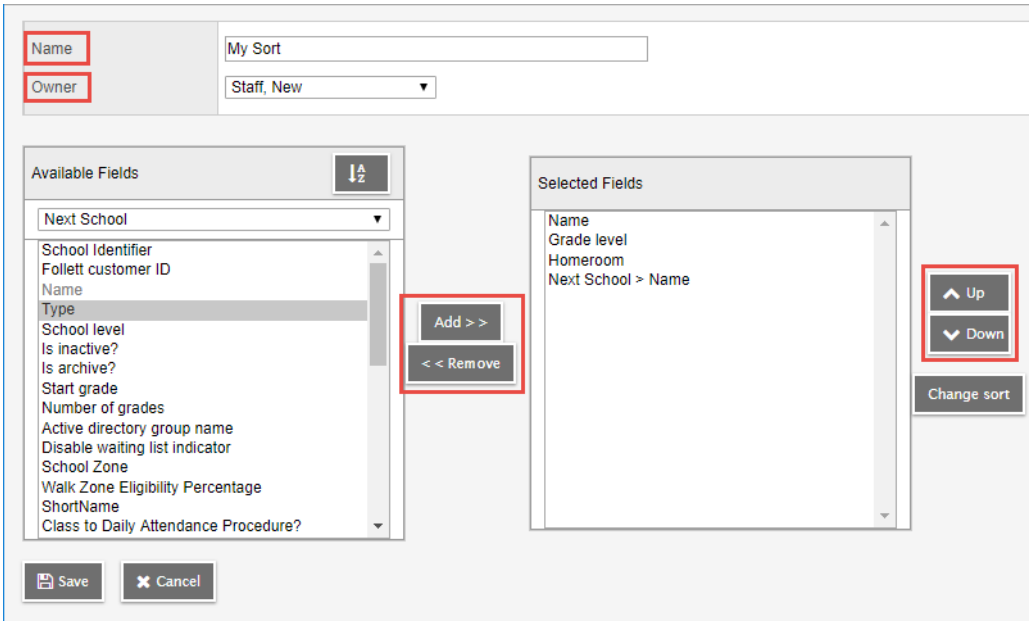
1. Click the a→z icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click the New button.
3. In the pop-up window:
   a. **Name**: Give the sort a name that makes sense for its function.
   b. **Owner**: Who will see and use this sort? If the user has Division or school access, they will have the ability to set this sort for all users with those views. If the user sees no other selection, they are creating a User sort.
   c. In the **Available Fields** window, use the drop-down menu to select the table from which to sort fields. These are listed in the order most frequently used. To help find a field, use the Sort A-Z button to sort them into alphabetical order.
   d. Click on the field to select it. It will be highlighted in the list. Click the Add > > button. This will move the field into the **Selected Fields** window.
   Note: Multiple fields from multiple tables can be selected or the same field set.
4. Once all fields have been selected, click **Save**.
5. Use the Up and Down buttons to arrange the fields in the desired sort order. The Change sort button will cause (desc) to appear beside the field highlighted when clicked. This means the data in that field will be sorted in reverse (descending) order when this new sort is applied to a field set.
6. Click **Close** on the *Manage Sort Orders* window. The sort order will now display in the list for selection.



8.3.4 Edit a Sort Order

A user can only edit a sort order that exists at the level of their user role view. In other words, a Division user who has access to both Division and school views can edit a *Division* or *School* sort order. A school user can edit a *School* sort order because they have school view access. A user with staff view will only be able to edit their own *User* sort orders.

1. Click the a→z icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be edited. It will be highlighted.
3. Click the Edit button.
4. In the pop-up window:
   a. **Name**: Enter the new name for the sort order, if appropriate.
   b. **Owner:** Who will see and use this sort order? If the user has Division or school access, they will have the ability to set this sort order for all users with those views. If the user sees no other selection, they are creating a User sort order.
5. In the *Available Fields* window, click the fields of information to be added to the sort order. Click the Add > > button. Alternatively, in the *Selected Fields* window, click the fields of information to be removed from the sort order. Click the < < Remove button.
6. Click **Save**.
7. Click **Close** on the *Manage Sort Orders* window.



8.3.5 Copy a Sort Order

A user may see a sort order in the list that suits their needs, but wants to add or remove some information from it. If the user does not own the sort order, a copy can be made and adjusted to suit the need.

1. Click the a→z icon and select **Manage Sort orders . . .**
2. In the *Manage Sort orders* pop-up window, click on the name of the sort order to be copied. It will be highlighted.
3. Click the Copy button.
4. In the pop-up window:
   a. **Name:** Give the sort order a name that makes sense for its data set.
   b. **Owner:** Who will see and use this sort order? If the user has Division or school access, they will have the ability to set this sort order for all users with those views. If the user sees no other selection, they are creating a User sort order.
5. Click **Save.**
6. Click **Close** on the *Manage Sort Orders* window.

If a sort order has been copied, it may be practical to hide or delete the original to avoid confusion.

8.3.6 Delete a Sort order

A user can only delete a sort order that exists at the level of their user role view. In other words, a Division user who has access to both Division and school views can delete a *Division* or *School* sort order. A school user can delete a *School* sort order because they have school view access. A user with staff view will only be able to delete their own *User* sort orders.

1. Click the a→z icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be deleted. It will be highlighted.

3. Click the Delete button.
4. Click **Close** on the *Manage Sort Orders* window.

8.4 Quick Charts

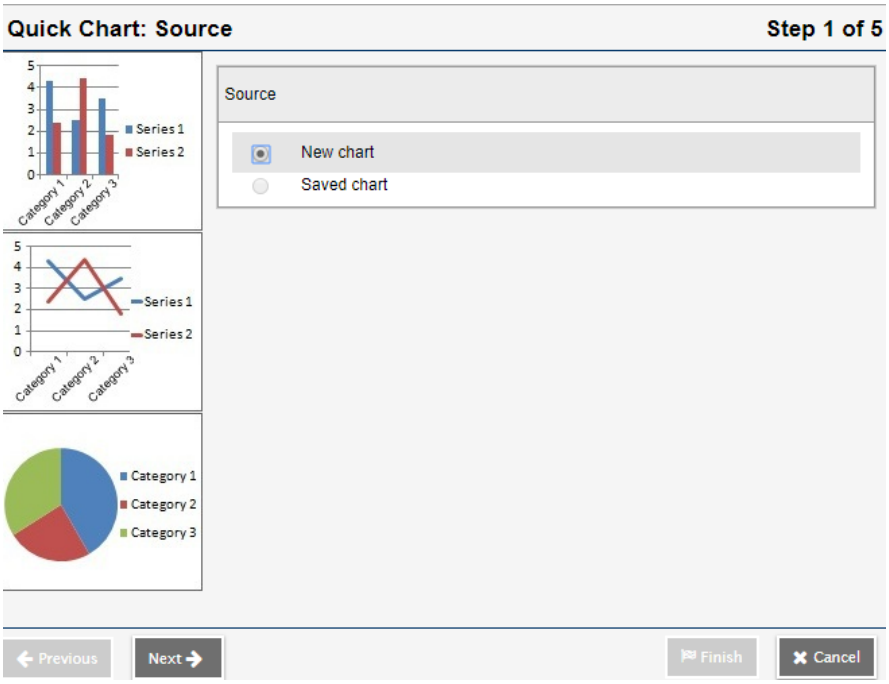
Charts provide an organized way to represent data visually. The Quick Chart feature enables the user to create bar, line, and pie charts from any standard list page. These charts can be saved for future use. Users with privileges to manage school and/or Division resources can create charts to share at both the Division and school levels.

Click the icon to access the following options:

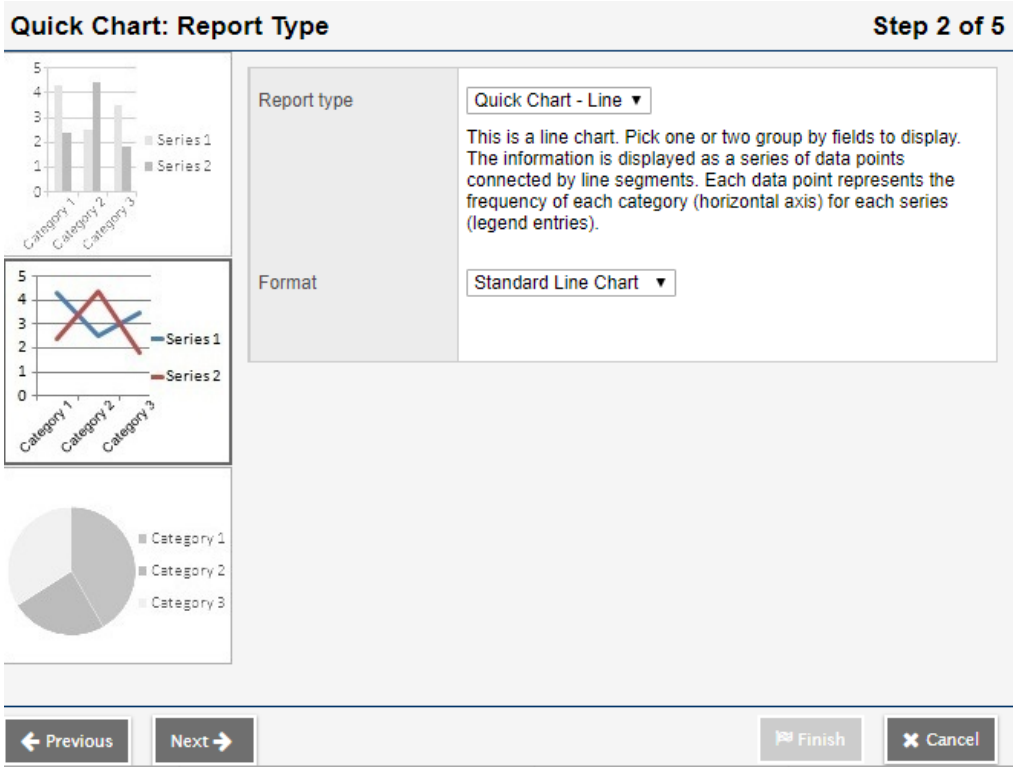
- **Create Quick Chart**: Brings up the Quick Chart Wizard, which allows the user to customize many different areas of the resulting chart.
- **Bar Chart**: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the bar chart.
- **Line Chart**: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the line chart.
- **Pie Chart**: Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the pie chart.

8.4.1 Create a Quick Chart:

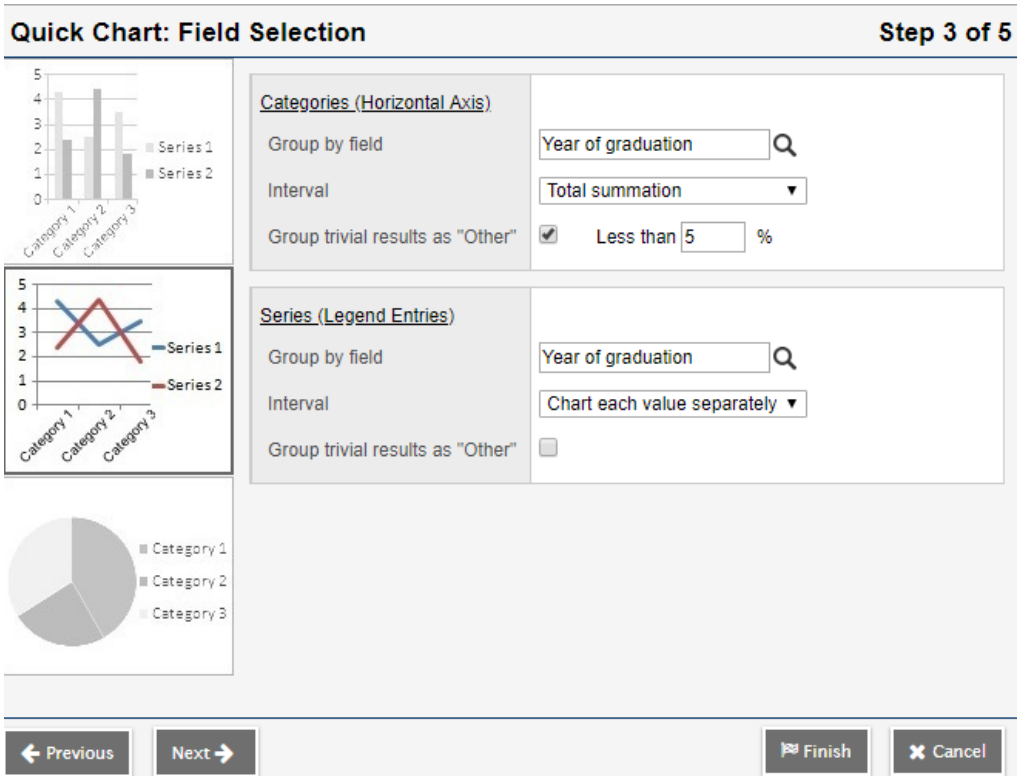
1. Click the icon and select **Create Quick Chart** to open the *Quick Chart* wizard, or select *Quick Chart* from the **Reports** menu. The *Create Quick Chart wizard* displays:



2. *Step 1: Source*.
    a. Select **New chart**.
    b. Click **Next**.
3. *Step 2: Report Type*
    a. Click the **Report Type** drop-down to select one of the following:
        i. Quick Chart—Bar
        ii. Quick Chart—Line
        iii. Quick Chart—Pie
4. Click the **Format** drop-down to select the format for the chart. Select one of the following:
    a. Standard
    b. Enhanced



5. *Step 3: Field Selection*.
    a. In the **Categories (Horizontal Axis)** box, click the icon at **Group by field** and make a selection. The user can choose from the tables and fields that are related to the records in the current list. The **Categories (Horizontal Axis)** box, sometimes called the independent variable, sets the data to measure. If the choice is a Numeric, Date or Time field, additional options appear to further organize the data, which will be displayed on the chart.



b. For bar and line charts, a **Series (Legend Entries)** box is available. Click the icon at the **Group by field** and make a selection. Series groups appear in a legend to the right of the chart and provide a color-coded guide to data shown in the chart.

Note: Bar and line charts do not require both a category and series to be selected. Charts that exclude a category will not have x-axis labels. Charts that exclude a series will not include a legend.

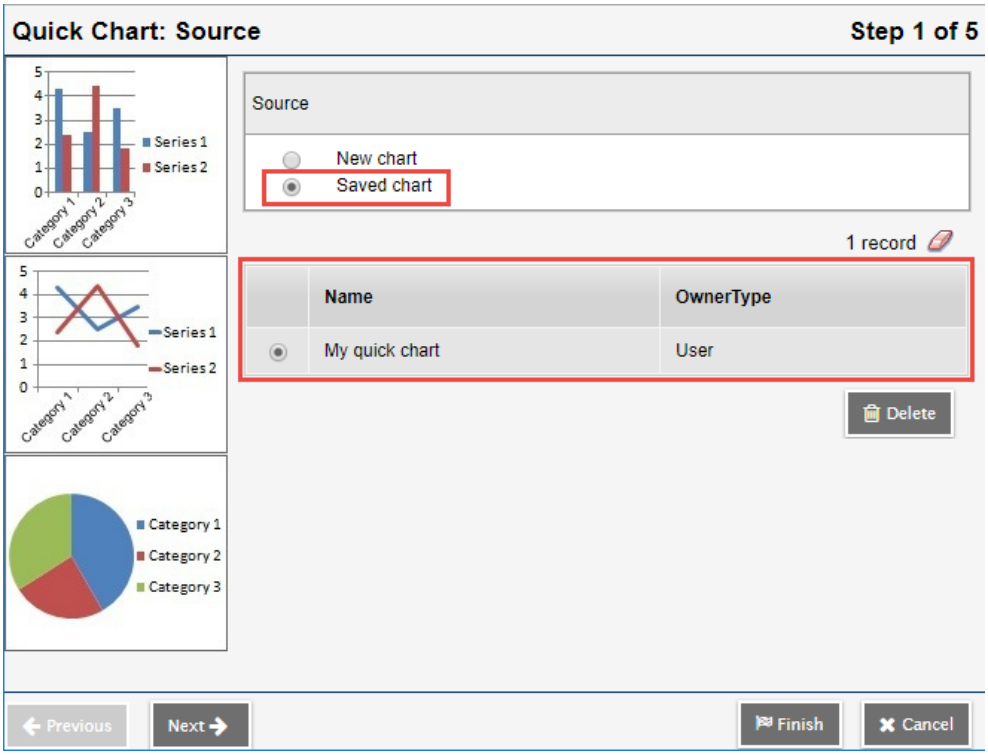
6. The Interval drop-down menu for numeric has the following options:
   a. **Chart each value separately**: Each numeric value gets its own data point.
   b. **Interval group**: The **Interval** field groups the results according to the number entered in the **Interval group size** field. For example, to display the group Year of Graduation in the chart in pairs, a 2 would be entered in this field.
      The **Interval group size** displays. The value in this field sets the number of data points that get combined into a single category.
   c. **Interval group summations**. The **Interval group size** displays. The value in this field sets the number of data points that get combined into a single category.
   d. **Total summation**: Sums the values of the Group by field.
7. If the list of data being charted contains trivial cases which should be excluded from the chart, the option **Group trivial results as "Other"** is provided. Select this checkbox if the users wants to group all data points of less than a certain percent together into a single point called Other. For example, if the user is only concerned with viewing the most common conduct codes, select this option and enter a value of 5% in the Less than % field. This will group all codes that total less than 5% of the total data into a single Other group.

Note: This option can only be used in the Categories ***or*** Series, not both.

8. Click **Next** to continue the wizard and set chart header and footer display options.
9. Click **Finish** to create the chart.
   Note: The **Finish** button can be clicked at any point in the wizard. New charts use the default format options if **Finish** is clicked at any point before the final step in the wizard.

8.4.2 Use a Saved Quick Chart

1. Click the icon and select **Create Quick Chart** to open the *Quick Chart* wizard, or select *Quick Chart* from the **Reports** menu. The *Create Quick Chart wizard* displays:



2. *Step 1: Source*. Click **Saved report.** A table of saved Quick Charts displays in the dialog box. Select the Quick Chart to be viewed or edited.
3. Click **Next** to continue editing, or click **Finish** to show the chart.

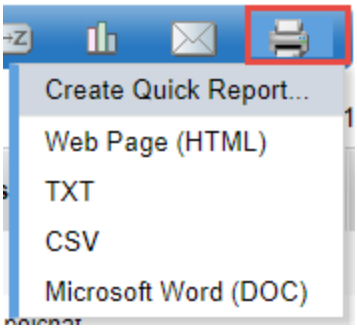
8.5 Quick Print

Users can generate a **Quick Print** using the icon in the menu bar on any list page.

8.5.1 To generate a Quick Print using the Quick Print icon:

1. Go to the list page containing the type of data to be reported on.
2. Select the records to be included in the report.

3. If individual records have been manually selected from a large list, be sure to go to the **Options** menu and click **Show Selected**. Users can also use a filter or query to isolate the records to report on. Quick Prints include any records that appear on the current list.
4. Click the Quick Print icon in the menu bar.



5. Select one of the format options.
    a. **Web Page (HTML)**: to view the information in an HTML file.
    b. **CSV**: to view the information in a text file that separates each field with a comma. If saved, the file will have a .CSV extension
    c. **TXT**: to view the information in a text file that separates each field with a comma. If saved, the file will have a .TXT extension.
    Note: The two comma-separated values formats (CSV and TXT) create identical files; the only difference is the file extension. Some Web browsers only handle one extension properly.
    d. **Microsoft Word (DOC)**: to view the information in a Word document.

Note: Different browsers handle quick prints in different ways. Users may need to change browser settings to allow downloads, or use shortcut keys such as Ctrl + S to save the data prior to opening it.

8.5.2 Maximize & Minimize

Users can click on these icons to hide top tabs to allow more records per page to be visible or to return top tabs to their view.

9.0 Quick Reports

Quick Reports provide an opportunity for a user to create a customized report that contains specific data elements from one or more tables. If the report is something that would be run multiple times or by multiple users, a Quick Report can be created and saved, then selected from the list as needed.

Quick reports can be created in different areas of the application with elements that are relevant to the chosen area (top tab and side tab) of the application.

9.1 Create a Quick Report

Quick Reports can be created with different presentations. The following sample reports use the same fields, but are present differently:

- **Simple:** A list of records and the selected fields

Release of Info
04/04/2018

Student	Pupil #	Alerts	DOB	YOG	Grade	GrSubLvl	EnrStatus	School > Name	Homeroom	PAC	Release of Info
Adedoyinbolaji, Liamjames	706925		05/06/2003	2021	09		Active	Claremont Secondary	2021-06	Yes	No
Critch, Pushwinder	706809		20/11/2001	2019	10		Withdrawn	Claremont Secondary	ZU02	No	Yes
Achenn, Kaivalya	304269		24/10/1998	2017	12	SU	Graduate	Claremont Secondary	2017-07	No	No
Linharesdeoliveira, Mihaisebastian	215916		28/11/1997	2018	12		Active	SD63 Continuing Ed	BRMD10		

- **Detail:** A page for each record with selected fields aligned vertically

Release of Info
04/04/2018

Student:	*Adedoyinbolaji, Liamjames*
Pupil #:	706925
Alerts:	
DOB:	05/06/2003
YOG:	2021
Grade:	09
GrSubLvl:	
EnrStatus:	Active
School > Name:	Claremont Secondary
Homeroom:	2021-06
PAC:	Yes
Release of Info:	No

Release of Info
04/04/2018

Student:	*Critch, Pushwinder*
Pupil #:	706809

- **Group:** A list of records and the selected report fields, grouped by a selected field (School Name in the sample)

Release of Info
04/04/2018

School > Name: Claremont Secondary

Student	Pupil #	Alerts	DOB	YOG	Grade	GrSubLvl	EnrStatus	School > Name	Homeroom	PAC	Release of Info
Adedoyinbolaji, Liamjames	706925		05/06/2003	2021	09		Active	Claremont Secondary	2021-06	Yes	No
Critch, Pushwinder	706809		20/11/2001	2019	10		Withdrawn	Claremont Secondary	ZU02	No	Yes
Achenn, Kaivalya	304269		24/10/1998	2017	12	SU	Graduate	Claremont Secondary	2017-07	No	No

School > Name: SD63 Continuing Ed

Student	Pupil #	Alerts	DOB	YOG	Grade	GrSubLvl	EnrStatus	School > Name	Homeroom	PAC	Release of Info
Linharesdeoliveira, Mihaisebastian	215916		28/11/1997	2018	12		Active	SD63 Continuing Ed	BRMD10		

- **Summary:** Cumulative values based on the records selected (School Name in the sample)

Release of Info
04/04/2018

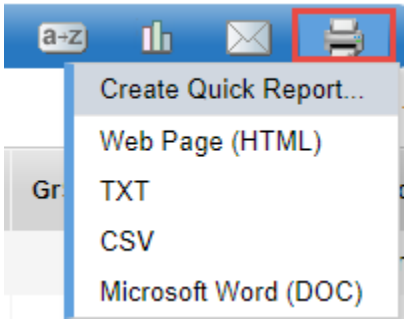
Summary School > Name: Claremont Secondary		
Totals	School > Name: Claremont Secondary	3

Summary School > Name: SD63 Continuing Ed		
Totals	School > Name: SD63 Continuing Ed	1

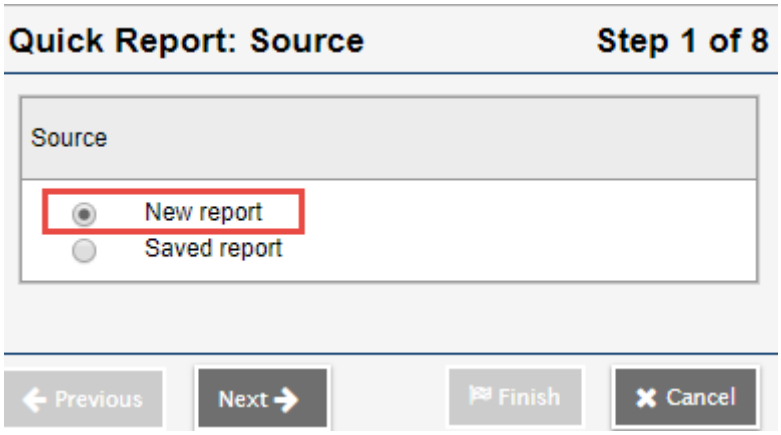
Report Summary		
Totals	Overall	4

In the example below, the simple Quick Report will provide a school with a report indicating which students have Release of Information indicators, and is created from the **Student** top tab.

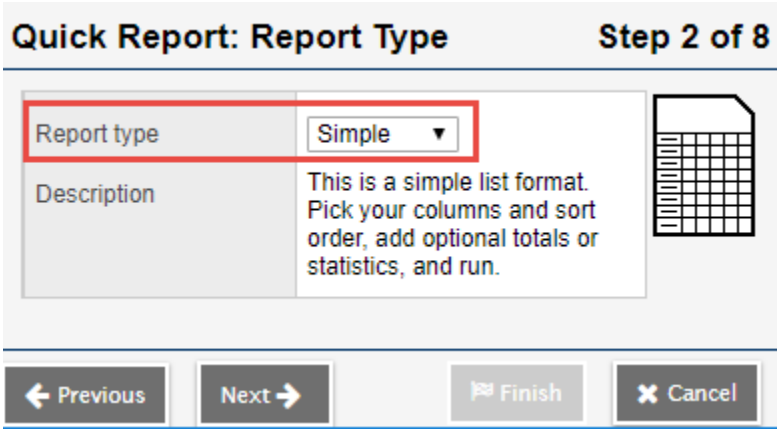
1. In the **School** view, click the **Student** top tab
2. Click the Quick Reports Icon and Select Create Quick Report or, Click the **Reports** menu item and select **Quick Report**



3. In Step 1 of the Wizard, select **New Report**. Click **Next.**

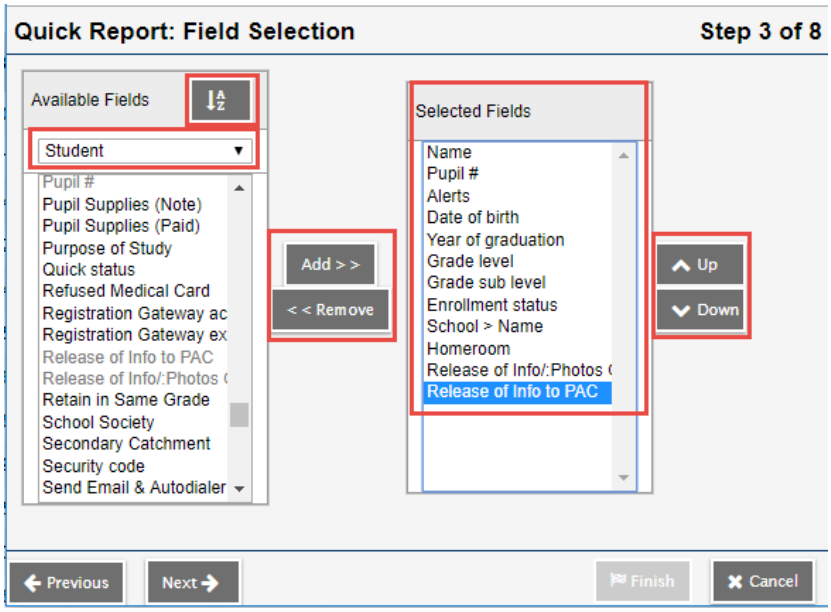


4. In Step 2 of the wizard, select **Simple.** Click **Next**.

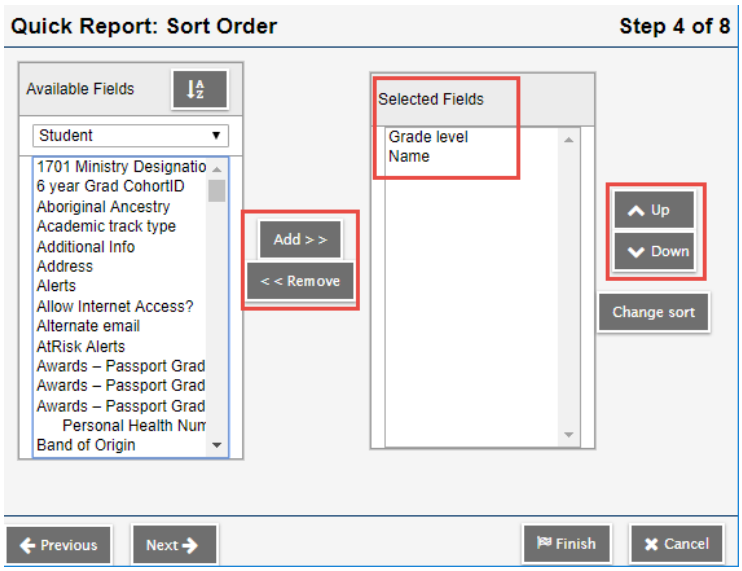


5. In Step 3 of the wizard, the current field set will display as the selected fields
6. Select the desired fields and click the **Add >>** button to move it to the *Selected Fields* box.
    a. The drop-down menu Under Available Fields can be changed from the Student table to a different table to combine data elements from other areas of the application.
    b. The Sort button will sort the available fields for the selected table in alphabetical order, making it easier to locate specific fields.

7. In the *Selected Fields* box, click on any fields not needed and click the **Remove** button.

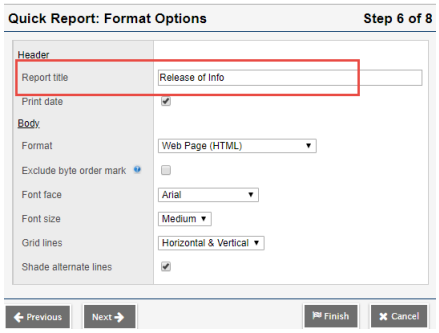


8. Click **Next**.
9. In step 4 of the wizard, select the field(s) to sort by in the *Available Fields* list and use the **Add** button to move them to the *Selected Fields* box. The primary sort will be the first field in the *Selected Fields* box; the secondary sort will be the second field, etc.

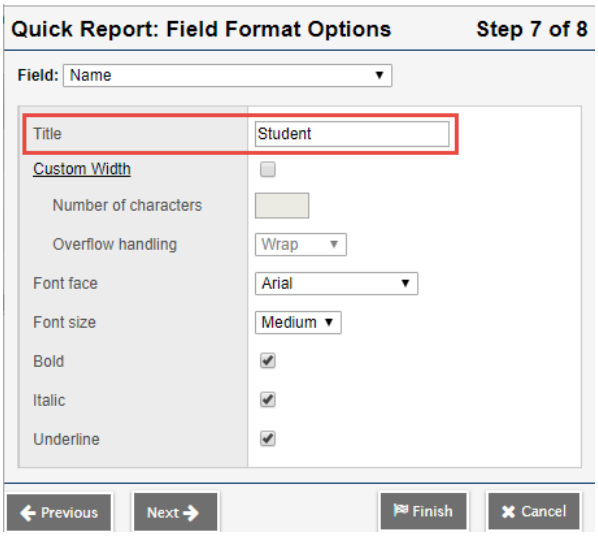


10. Click **Next**.
11. Step 5 of the wizard is optional. Use these functions to create counts, and page breaks if desired.
12. Click **Next**.

13. In Step 6 of the wizard:
    a. **Report Title:** Enter a title for this report.
    b. **Print date:** If selected, the date the report was generated will appear on the report.
    c. **Body > Format:** Select the format for the report.
    d. **Exclude byte order mark:** Can be checked if the report will be loaded to a system requiring limitations in text. Hover over the question mark symbol for details.
    e. **Body > Font Face:** Select the font for the report.
    f. **Body > Font Size:** Select the font size for the report.
    g. **Body > Grid lines:** Select whether the report should have grid lines for horizontal, vertical, or both, or none.
    h. **Shade alternate lines**: If selected, the data will appear with grey shading on alternate lines.

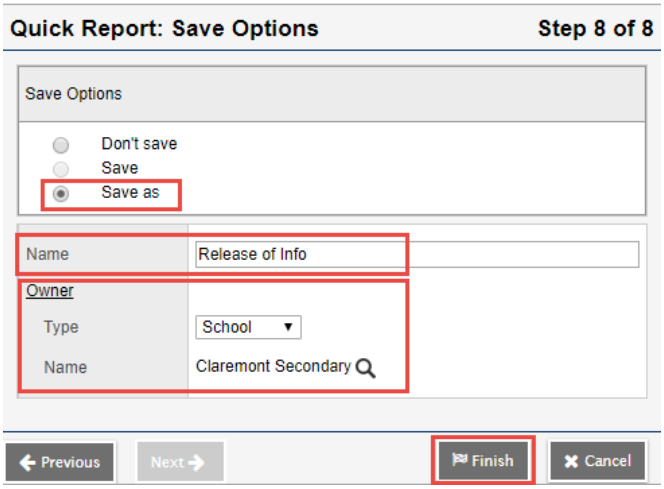


14. Click **Next**.
15. Step 7 of the wizard is optional. It allows the user to rename the fields that will appear on the report. To adjust the name of a field, select it from the **Field** drop-down. In the **Title** field, enter a name. Note that the field is only being re-named for the report – not for the application. *Font, Size, Bold, Italic* and *Underline* can be selected to tailor the field name in the report.



16. Click **Next**.

17. In Step 8 of the wizard, the report may be saved for future use. To save this quick report, click the **Save As** radio button.
    a. **Name:** Enter a name for the saved report.
    b. **Owner Type**: Select from the drop down list.
        i. **Division**: Report will be available for Division users
        ii. **School**: Report will be available for School users in the selected school
        iii. **User**: Report will be available for only the user creating the report
    c. **School**: Select the school (if applicable)



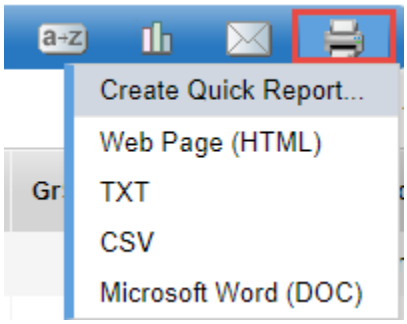
18. Click **Finish.**

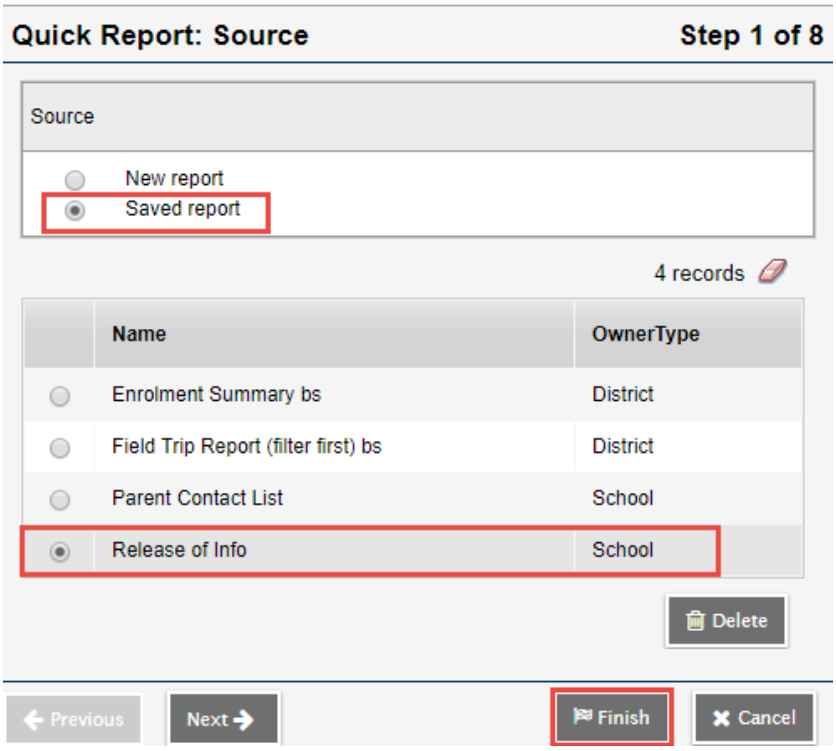
9.2 Run a Saved Quick Report

If a report was saved, it is now available in Quick Reports based on the Owner type selected.

Quick Reports provide an opportunity for a user to create a customized report that contains specific data elements. For the example below, this is done from the Student top tab, but quick reports can be created in different areas of the application with elements that are relevant to the chosen area of the application.

1. In the **School** view, click the **Student** top tab
2. Click the Quick Reports Icon (printer) and Select Create Quick Report OR Click the **Reports** menu and select **Quick Report**



3. In Step 1 of the Wizard, select **Saved report.**
4. The available saved reports will display, select the report.

5. Click **Finish** to run the report as is or click Next to make changes to the report an proceed through the steps of the wizard as outlined in *Creating a Quick Report.*