Fundamentals

April, 2015

Version History

Version	Date	Description
1.0	April 1, 2015	Initial version

Confidentiality

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1.0 Fundamentals Training

1.1 Logging In

An account will be created and log-in information issued to a user as per district policy. When a user initially logs in, they will be prompted to change their password immediately. Passwords are case-sensitive and must be in compliance with the Ministry of Education requirements.
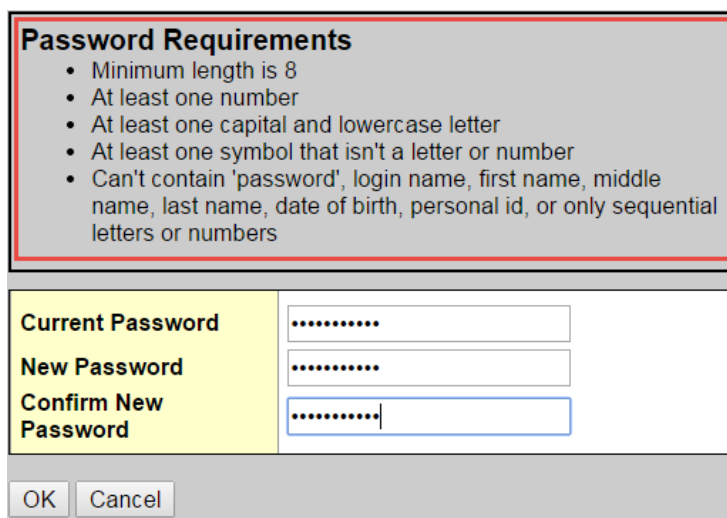
1. Go to https://www.myeducation.gov.bc.ca/aspen/logon.do
2. Enter the username provided to you in the **Login ID** field.
3. Enter the password provided to you in the **Password** field.

4. Click **Log On**.
5. You will be prompted with the following window. In the **Current Password** field, enter the password issued for your initial login. In **New Password** and **Confirm New Password**, enter a new password that observes the requirements indicated in the top portion of the pop-up.
6. Click **OK**.

2.0 Managing User Preferences

2.1 Security

Your access to MyEducation BC will be determined by the security role that is assigned to your user account. This access is assigned by the district as required for the role and duties you perform in your role.

2.2 Settings Bar

The settings bar is the first step in navigating MyEducation BC. The options available to the user here are determined by the security access granted by the district.   *Select School*, for example, will only appear if the user has been assigned to more than one school.

All users will see ***Set Preferences*** and ***Log Off***
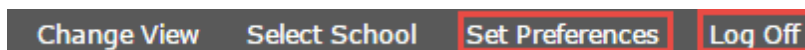
2.2.1 Change View

Change View allows the user to navigate between different levels of the application, if the appropriate security access has been given to the user. The example below is a common display for a district level user.
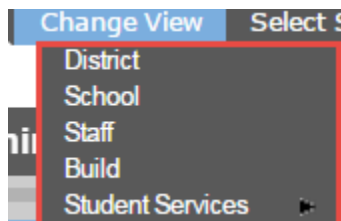
To change views:

1. Click the **Change View** selection on the settings bar.
2. Click on the name of the view you wish to work in. The name of the view you are in will be displayed just below the settings bar.
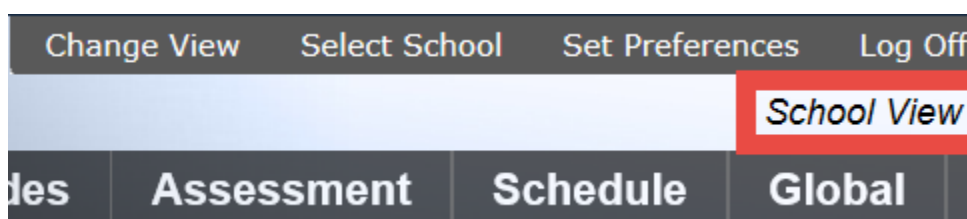
2.2.2 Select School

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. In the **Change View** menu, select **School**
2. Click the **Select School** selection on the settings bar.   This will generate a pop-up window.
3. Click the radio button beside the appropriate school.
4. Click **OK**.

2.2.3 Set Preferences

This option on the settings bar allows you to personalize MyEducation BC for your use. These settings are specific to your user account. There may be more options that in the screenshot below, depending on the view you are working in (District view is different from School view).

2.2.3.1 General

These settings determine the "look and feel" for MyEducation BC for the individual user. See the table below the screenshot for a definition of each of these fields.

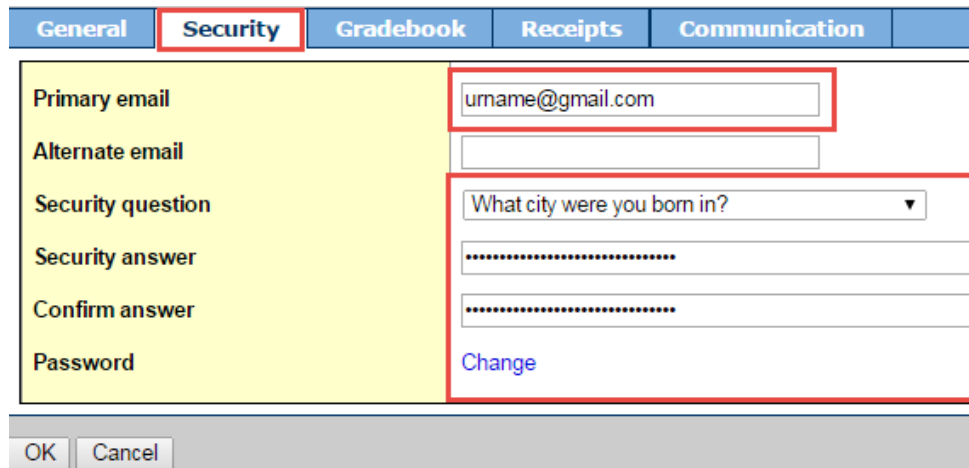| Field	Description
Default Locale	Click this drop-down to select your language and date preferences when using MyEducation BC. This selection also affects the display of dates in MyEducation BC. If you select: **English Canada**: Dates appear as date/month/year **French Canada**: Dates appear as year/month/date **US English**: Dates appear as month/date/year
Default View	Click this drop-down to select the default view you want you want to see when logging on to MyEducation BC, such as the School view. (This option is only available if you have access to more than one view.)
Default School	Click the 🔍 to select the default school you want to use when accessing the School view. (This option is only available if you have access to more than one school.)
Auto-save interval (minutes)	Type the number of minutes you want to lapse before the system automatically saves the information you enter on a detail page. The system displays a message to the right of the **Save** and **Cancel** buttons on detail pages, alerting you of the time of the last auto-save, or why the auto-save failed.
Disable User-defined Help	If your district creates and uses user-defined help, and you do not want to view the user-defined help icon 🔹 for fields and templates, select this checkbox.
Records per page	Type the number of rows you prefer on a list page. (Most users like to see all rows on a page without having to scroll.)
Show lower page controls	Page controls will automatically appear 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. `<   1:Adams, Gillian        ▼   >`
Warn on save	If you want the system to display a warning when you click Save on a list page after you have used the Modify List option, select this checkbox.

2.2.3.2 Security

The Security sub-top tab in Set Preferences records your email address and security question and answer. This information must be populated for the user to be able to use the "Forgot Password" function in MyEducation BC.   This area also allows the user to change their password at any time. See the table below the screenshot for a definition of each of these fields.

Field	Description
Primary email	Type your primary email address. The system sends your password to this address if you click the 'I forgot my password' link on the logon page. Note: This is the address that appears in the From field when using the Send Email option.
Alternate email	If you already entered an alternate email address, such as for your Google Docs account, that address appears.
Security question	Click this drop-down to select the security question you want to answer if you forget your password.
Security answer	Type the security answer.
Confirm answer	Type the security answer again.
Password	Click Change to change your password. Password requirements can be viewed by clicking Click to view.

2.2.4 Log Off

All users should use the **Log Off** item in the *Settings Bar* to exit MyEducation BC. This will properly terminate the session and force the entry of a login id and password to re-enter the system.

2.3 Removing Browser Buttons (F11)

Browser buttons for back and forward and cancel should not be used to navigate the application. In MyEducation BC, it is always best to use the application buttons to close a pop-up window, go back to a previous screen, exit the application, etc.

Users can remove the temptation to use the browser buttons by pressing F11 to hide the browser menu. This is a toggle function, so pressing F11 again will cause the browser buttons to re-appear when needed.

3.0 Navigation Tools & Selecting Records

3.1 Top Tabs and Side Tabs

Top tabs represent functional areas of MyEducation BC. These are scoped to the user view and role, so a user will only see what they have been given to view or work with. 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 appear at the top of a list, when a side tab is selected. A good example of this is in the **Student** top tab > **Details** side tab.

3.3 Page selector

This navigation tool allows the user to select a range of records, something like a dictionary.   If the user has set their preference to display 10 records per page, each selection in the paginator will display 10 records.   This tool will appear at the top and bottom of the list if the user has set their preference to *Show lower page controls*.

A user can 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.
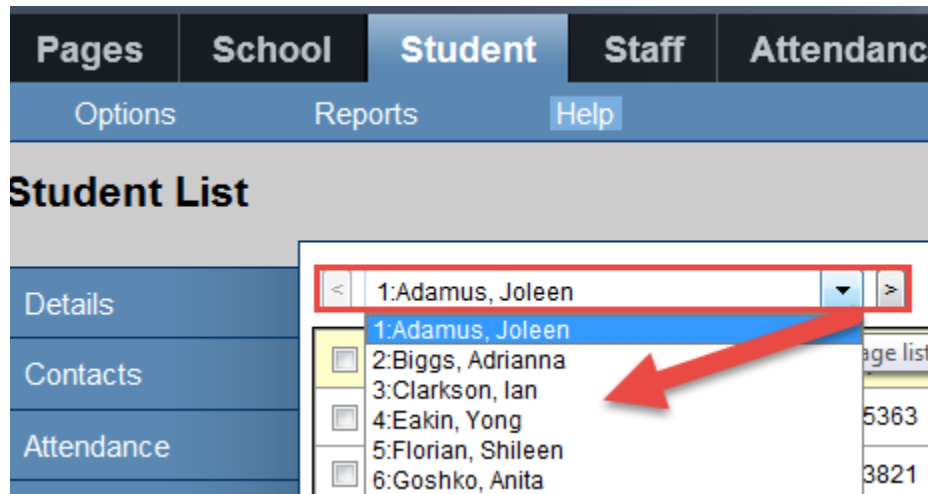
3.4 Record Navigation Bar

The *Record Navigation Bar* can be used to change the record being viewed. It generally appears when the user is in a side-tab where the information displayed is limited to one record.

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 paginator or to the last record in the paginator. The first and last record buttons do not respond to the user Records per page preference.

3.5 Ctrl + F

The Ctrl + F command works on every list in MyEducation BC, including pop-up windows with lists. This will generate a search box where the user can enter the search criteria. It is important to understand that the search will be conducted on the first column of information in the field set, **or** the column of data that represents the primary sort.

Filters can also affect the search results. 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.

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

Enter the search value.

smith

OK   Cancel

3.6 Hyperlinks

Hyperlinks are in blue lettering which show an underscore 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 what is being viewed and the path used to arrive at that location.

In the example below, the user is viewing an attendance record for February 23, 2015 for the student Joleen Adamus in the **Attendance** top tab > **Daily History** side tab.

Breadcrumbs will create a blue hyperlink that the user can click on to return to the full list of records.

3.8 Checkboxes vs Radio Buttons

There are many selection lists throughout MyEducation BC. 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. Good examples of this are:

- **Student** top tab: More than one student can be selected at a time because there are checkboxes in front of their names.

- **Student** top tab > **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 MyEducation BC.

4.0   Icons and Alerts

MyEducation BC 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 to let you know 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 Demographics and Student Services documentation.

5.0   Menu Bar

The menu bar appears just below the top tabs in MyEducation BC. The menu headers are the same regardless of the top tab the user has selected. The items displayed in the menu will change, depending on the top tab *and* side tab the user has selected.

5.1 Options

The **Options** menu is an action centre. This is where a user can initiate actions on the data that is displayed on the screen. In some cases, the list of items may show an arrow, indicating additional options.

5.2 Reports

Reports will display a list of reports available in specific areas of the application. It is important to note that reports are associated with top tabs and side tabs and relate to the data displayed on page. For example: In the **Student** top tab, clicking on **Reports** will show a list of several reports, and a few report categories, indicated by an arrow, which list additional reports. Staying in the **Student** top tab and clicking on the **Transcript** side tab will generate a shorter list of reports that are related to student transcript information.

5.3 Help

Several Help options are available through Help on the menu bar as well. It is important to note that these tools are not yet customized for MyEducation BC and may reference options or functions that are not available to District and School Users. However, it is still useful for many basic functions.

The *About MyEducation BC* item will provide information about the server to which your session is connected. This will display below the copyright information and can be useful information for the service desk if users are experiencing problems with performance or report running in MyEducation BC. Example: vaspnapprd3 indicates that the user is on server 3.

5.3.1 On-line help

On-line help opens in a new window and provides a variety of ways to search for information. The on-line help function will respond to the screen you are viewing when you enter the on-line help. For example, if you are on the **Student** top tab, topics on student information will display. If you change to the **Attendance** top tab and enter the on-line help, topics related to attendance will be displayed.

5.3.2 Release Notes

Release notes will provide information about the lastest changes to the software product. These release notes will not include additional enhancements and configuration changes made to MyEducation BC specifically. These items are currently posted to the ISW.

5.3.3 User Guides

User guides open up as documents with hyperlinks in the table of contents. These guides can be very helpful for some areas of the application as a reminder of how to perform certain functions. Remember that they are not customized for MyEducation BC and the custom guides posted on the ISW should be used wherever possible, as they represent the customized functionality of MyEducation BC.

5.3.4 Quick Reference Cards

Quick reference cards are short, task-specific reference documents. These can be very useful for end users as reminders for specific tasks without generating a large document.

5.3.5 Videos & Training Tools

This area of the Help menu provides categories of training tools which contain Lesson Plans, Quick Reference Guides and Videos. Clicking on a category will display all of the options within that category.   The quick reference guides within these toolkits are different from the quick reference *cards.* The quick reference guides are task-specific, but are often more than 2 pages.

5.4 Menu Bar Tools

The menu bar provides several tools for filtering, displaying, sorting and exporting data in MyEducation BC. The options that display when using these tools depend on the top tab and side tabs of the application.

These tools are described below.

5.4.1 Filters

Filters provide the user with the ability to group records in a list. Filters are connected to queries, so they are dynamic – every time a user selects a filter, it will display all of the latest information in that group of records. Users have the ability to hide filters that are not useful to them and to change the order in which the filters display in the filter list.

Users also have the ability to create their own filters.
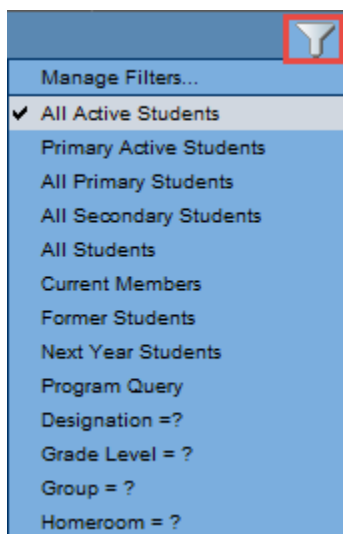
The filters that appear in the list already have been created at the Enterprise level or by district users who may have created filters for their own schools.
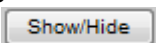
1. Click the ▽ icon and select **Manage Filters . . .**
2. In the *Manage Filters* pop-up window, users may see the following in brackets beside the name of the filters:
   a. **System**: these filters are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
   b. **Enterprise**: these filters have been created at the enterprise level and appear for all districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
   c. **District**: these filters have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless you have access to the District view.
   d. **School**: these filters have been created either by a school user, or been created by a district user in the school view. They will be visible to all users who have access to the School view. These filters can only be modified or deleted by a school user or a district 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.

5.4.1.1 To Move a Filter

A user can choose to have the filter they use the most be the default in 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. Any filter placed at the very top of the list will become the default filter when entering the screen.
4. Several filters can be moved at once by using Shift + click and using the [Up] or [Down] buttons.
5. Click **Close.**

5.4.1.2 To 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**.

5.4.1.3 To 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 district 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.
    d. Click the radio button beside the query or snapshot in the list that the filter will be based on.
    e. Click **OK**.

      f.   The filter will now appear in the Manage Filters window and in the list below the

              ⧩ icon for this screen.

3.   Click **Close** on the *Manage Filters* window.

5.4.1.4 To Edit a Filter

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

5.4.1.5 To Copy a Filter

Because a filter is connected to a query or a snapshot, there are not too many 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 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 district 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, the user may want to consider hiding or deleting the original to avoid confusion.

5.4.1.6 Deleting a Filter

A user can only delete a filter that exists at the level of their user role view. In other words, a district user who has access to both district and school views can delete a *District* or *School* filter. A school user can delete a *School* filter because they have school view access. A user that only has 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.

5.4.2 Field Sets

Field sets simply 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 can be very useful for creating commonly used sets of information and then extracting those into a spreadsheet for analysis or manipulation.

The field sets that appear in the list already have been created at the Enterprise level or by district users who may have created field sets for their own schools.
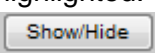
1. Click the ⊞ icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, users may see the following in brackets beside the name of the field sets:
   a. **System**: these field sets are part of the core application. They can be hidden or moved up or down in the list, but cannot be modified.
   b. **Enterprise**: these field sets have been created at the enterprise level and appear for all districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
   c. **District**: these field sets have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless you have access to the District view.
   d. **School**: these field sets have been created either by a school user, or been created by a district 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 district user with school view access.

5.4.2.1 To Move a Field set
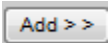
A user can choose to have the field set they use the most be the default in that screen by moving it to the top of the list.

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.**

5.4.2.2 To 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 appear 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**.

5.4.2.3 To 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 district 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.
    c. In the **Available Fields** window, use the drop-down menu to select the table you want to pull data fields from.   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 field you want to select so it is 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. Click **Close** on the *Manage Field Sets* window. The field set will now appear in the list for selection.

5.4.2.4 To 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 district user who has access to both district and school views can edit a *District* 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 district 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 you want to add to the field set. Click the Add >> button. Alternatively, in the *Selected Fields* window, click the fields of information you want to remove from the field set. Click the << Remove button.
6. Click **Save**.
7. Click **Close** on the *Manage Field sets* window*.*

5.4.2.5 To Copy a Field set

A user may see a field set in the list that suits their needs, but wants 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.
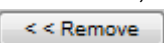
1. Click the ▦ icon and select **Manage Field Sets . . .**
2. In the *Manage Field Sets* pop-up window, click on the name of the field set to be copied. It will be highlighted.
3. Click the Copy button.
4. In the pop-up window:
    a. **Name:** Give the field set a name that makes sense for its data set.
    b. **Owner:** Who will see and use this field set? If the user has district 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.

5.4.2.6 Deleting 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 district user who has access to both district and school views can delete a *District* 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.

5. Click the ▦ icon and select **Manage Field Sets . . .**
6. In the *Manage Field Sets* pop-up window, click on the name of the field set to be deleted. It will be highlighted.
7. Click the Delete button.
8. Click **Close** on the *Manage Field Sets* window.

5.4.3 Sorts a-z

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. 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 order. This function can be used for multi-level sorts of up to 3 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 a-z 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 district 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, you may see the following 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 districts and schools. They can be hidden or moved up or down in the list, but cannot be modified.
    c. **District**: these sort orders have been created at the district level for the district level views. They can be hidden or moved up or down in the list, but cannot be modified unless you have access to the District view.

d. **School**: these sort orders have been created either by a school user, or been created by a district 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 district user with school view access.
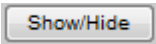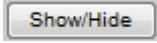
5.4.3.1   Move a sort order

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

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

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.**

5.4.3.2   To 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**.

5.4.3.3   To 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 district 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 you want to sort fields from.   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 field you want to select so it is 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 order you want them to sort. The Change sort button will cause (desc) to appear beside the field highlighted when you click the button. This means the data in that field will be sorted in reverse 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 appear in the list for selection.

5.4.3.4 To 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 district user who has access to both district and school views can edit a *District* or *School* sort order. A school user can edit a *School* sort order because they have school view access. A user that only has 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.
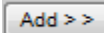4. In the pop-up window:
    a. **Name**: Enter the new name for the sort order, if appropriate.
    b. **Owner:** Who will see and use this sort order? If the user has district or school access, they will have the ability to set this sort order for all users with those views. If the user sees no other selection, they are creating a User sort order.
5. In the *Available Fields* window, click the fields of information you want to add to the sort order. Click the Add >> button. Alternatively, in the *Selected Fields* window, click the fields of information you want to remove from the sort order. Click the << Remove button.
6. Click **Save**.
7. Click **Close** on the *Manage Sort Orders* window.

5.4.3.5 To 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.
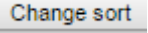
1. Click the [a-z] icon and select **Manage Sort orders . . .**
2. In the *Manage Sort orders* pop-up window, click on the name of the sort order to be copied. It will be highlighted.
3. Click the [Copy] button.
4. In the pop-up window:
   a. **Name:** Give the sort order a name that makes sense for its data set.
   b. **Owner:** Who will see and use this sort order? If the user has district 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, the user may want to consider hiding or deleting the original to avoid confusion.

5.4.3.6 Deleting 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 district user who has access to both district and school views can delete a *District* or *School* sort order. A school user can delete a *School* sort order because they have school view access. A user that only has staff view will only be able to delete their own *User* sort orders.
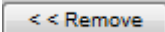
1. Click the [a-z] icon and select **Manage Sort Orders . . .**
2. In the *Manage Sort Orders* pop-up window, click on the name of the sort order to be deleted. It will be highlighted.
3. Click the [Delete] button.
4. Click **Close** on the *Manage Sort Orders* window.

5.4.4 Quick Charts

Charts provide an organized way to visually represent data. 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 district resources can create charts to share school- and district-wide.

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.

5.4.4.1 To Create a Quick Chart:

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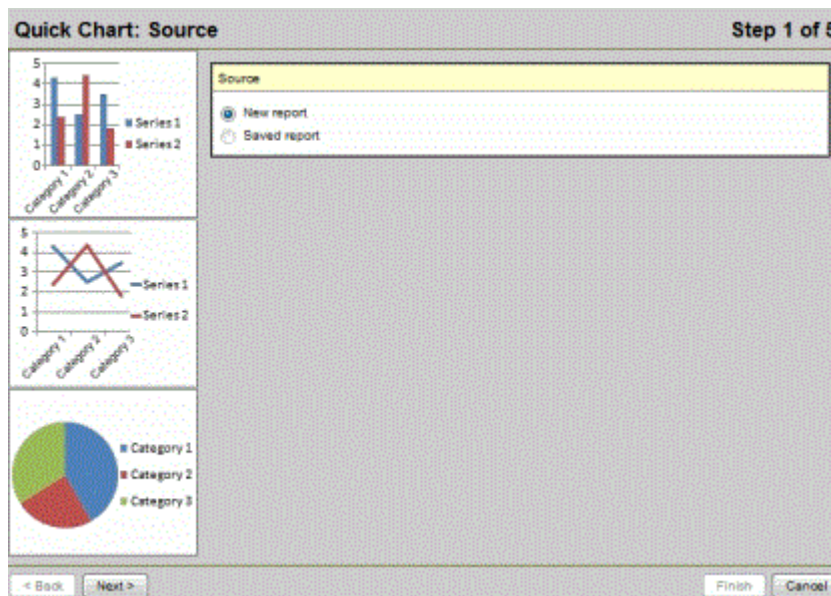
2. *Step 1: Source.*
   a. Select **New report**.
   b. Click **Next**.
3. *Step 2: Report Type*
   a. Click the **Report Type** drop-down to select one of the following:
      i. **Quick Chart—Bar**
      ii. **Quick Chart—Line**
      iii. **Quick Chart—Pie**
4. Click the **Format** drop-down to select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

Quick Chart: Report Type — Step 2 of 5

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.

Quick Chart: Field Selection — Step 3 of 5

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, if you want the group Year of Graduation to display in the chart in pairs, you would enter 2 in this field. The **Interval group size** appears. 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** appears. 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 which 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 options.
9. Click **Finish** to create the chart.
    Note: You can click **Finish** at any point in the wizard. New charts use the default format options if you click Finish at any point before the final step in the wizard.

5.4.4.2   To 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* appears:
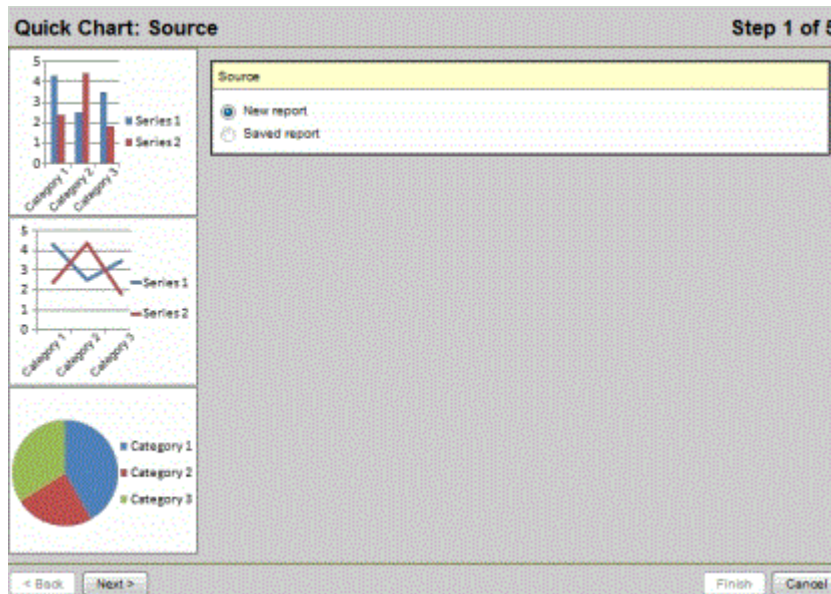
2. *Step 1: Source.* Click **Saved report.** A table of saved Quick Charts appears in the dialog box. Select the Quick Chart you want to view or edit.
3. Click **Next** to continue editing, or click **Finish** to show the chart.

5.4.5 Quick Print

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

5.4.5.1 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 you want to include on the report.
3. In the **Options** menu, click **Show Selected**, if you have manually selected records in a large list. 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.
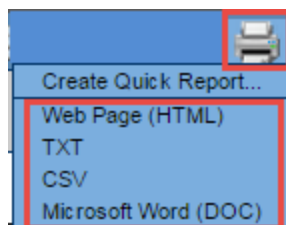
5. Select one of the format options.
   a. **Web Page (HTML)**: to view the information in an HTML file.
   b. **CSV**: to view the information in a text file that separates each field with a comma. If saved, the file will have a .CSV extension
   c. **TXT**: to view the information in a text file that 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.

6. 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.

5.4.6 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.

6.0 Snapshots

A snapshot is different from a filter. Where a filter is dynamic and always returns the latest data, 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.

6.1 Creating and Deleting Snapshots

6.1.1 Creating a Snapshot

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

2. In the **Options** menu, click **Show Selected**, if you have manually selected records in a large list. Users can also use a filter or query to isolate the records to report on. 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 district or school access, they will have the ability to set this for all users with those views. If the user sees no other selection, 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 select. For example, if you want to create a snapshot of students who are in grade 12 that have a program of study, select **Union**.

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

      iii. **Difference**: Any record that appears in the first snapshot you select, but not in the second. For example, if you want to create a snapshot of students who are in grade 12 but do not have a program of study, select **Difference**.

6. Click **Save**.

6.1.2 Removing 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] 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**.

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

6.1.3 Deleting 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 you that you will be deleting any filter associated with the snapshot.
4. Click **OK.**

6.2 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.

6.2.1 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.**

6.3 Removing 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.

6.3.1 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 to be removed from the snapshot.
4. Click the **Snapshots** side tab.
5. In the **Options** menu, select **Delete.**
6. Click **OK.**

7.0 Queries

A query is a *dynamic* filter. A query performs a new search and displays current information each time it 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.
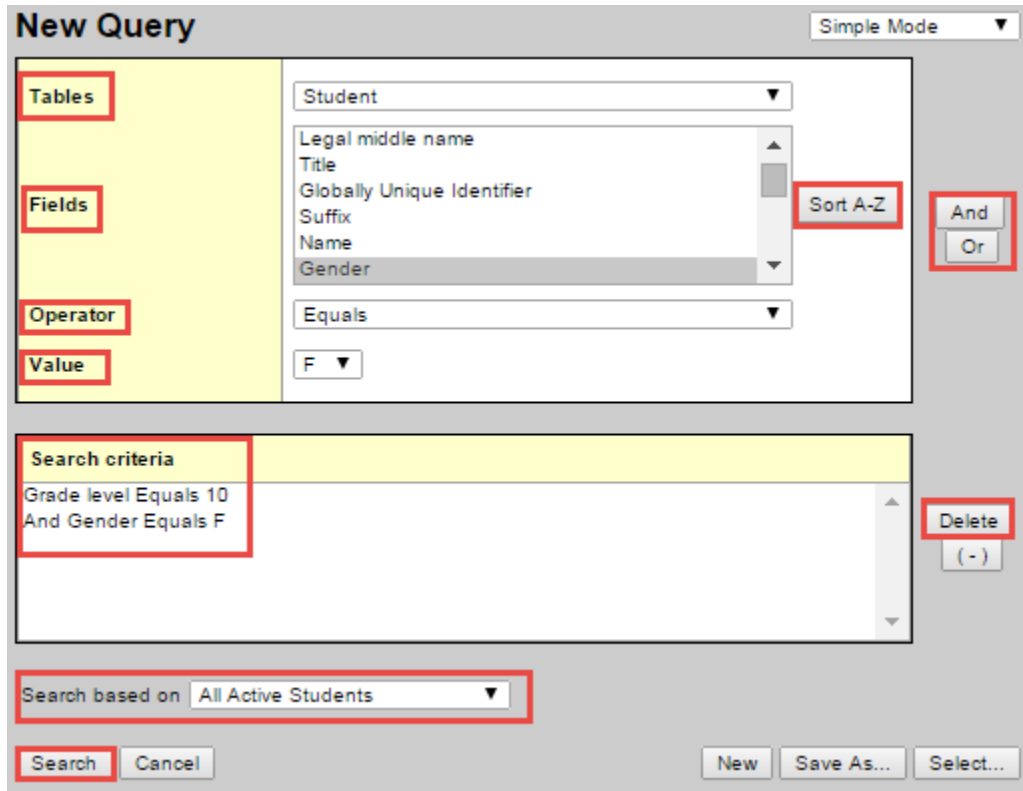
7.1 Creating a Simple Query

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 to search information in. The selected table determines the selections in the Fields area. For example, if you select the Student table, 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 you are searching 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.

7.2 Saving a Query

If you have created a query that you expect to use frequently, it can be saved for future use.

1. Create query using instructions for Creating a Simple Query until all the search criteria are selected.
2. Click **Save as. . .** The *Save as* dialogue box appears.
   a. **Name:** give the query a name that will make sense. If it will be saved as a filter, keep the name a reasonable length.
   b. **Owner type:** Click the drop-down to select one of the following:
      - **User**: to give a user or yourself 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.

- **District**: to give all users in a district access to the query. User must have access to the district 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.**

7.3 Editing 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 your query is still selected and click **Use.**
8. Adjust search criteria as necessary.
9. Click **Save**.

7.4 Copying a Query

Users can copy a query if it contains most of the elements they want, but adjustments are necessary.

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 your query is still selected and click **Use.**
8. Adjust search criteria as necessary.
9. Click **Save**.
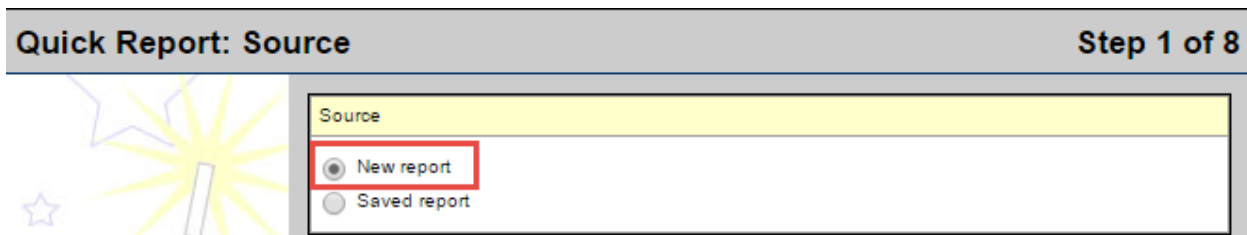
7.5 Delete a Query

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.

8.0 Creating a Simple Quick Report

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 **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, click the **Sort A-Z** button to sort the fields in the *Student* table in alphabetical order. The *Selected Fields* box will automatically contain the data fields from the field set displayed on the screen when entering the quick report function.
6. Select the desired fields and click the **Add >>** button to move it to the *Selected Fields* box. The drop-down menu can be changed from the Student table to a different table to combine data elements from other areas of the application.

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

8. Click **Next**.

9. In step 4 of the wizard, select the field(s) you want 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. If you wish to count the records, use these functions to do so.

12. Click **Next**.

13. In Step 6 of the wizard:
    a. **Report Title:** Enter a title that makes sense 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. **Body > Font Face:** Select the font for the report.
    e. **Body > Font Size:** Select the font size for the report.
    f. **Body > Grid lines:** Select whether the report should have grid lines for horizontal, vertical, or both, or none.
    g. **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, give it a name that makes sense. Note that the field is only being re-named for the report – not for the application.
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.
18. In the activated **Name** field, type a name for the saved report. A school user will likely be able to set the Owner type to School so the report is available to other users in the school.

Quick Report: Save Options   **Step 8 of 8**

Save Options

- Don't save
- Save
- ● Save as

Name	Release of Info Report

Owner

Type	School ▼
Name	Queen Charlotte Secondary 🔍

19. Click **Finish.**