Categorize and Collaborate Data Tables

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HOW TO CREATE AND USE CUSTOM CATEGORIES IN MY DATA TABLES

(QUICK LINKS)

Learn how to use the custom categories in **My Data Tables** to organize your items for easier access.

Navigate to the **Data Tables** application. Click **My Data Tables** on the left navigation menu.
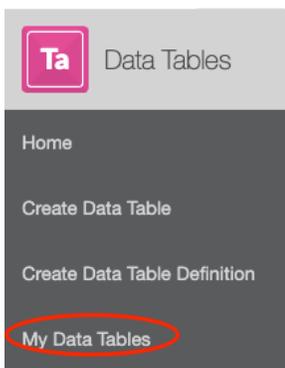
Select the **Actions Gear** on the right and select **Add New Category.**

Give your Category a **Label** and, optionally, a **Description**. (If you've already created other categories, you also have the option of nesting the new category in one of them) and click **Save**.
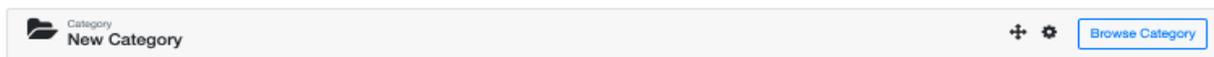
Create Category   ✔ Save   ✖
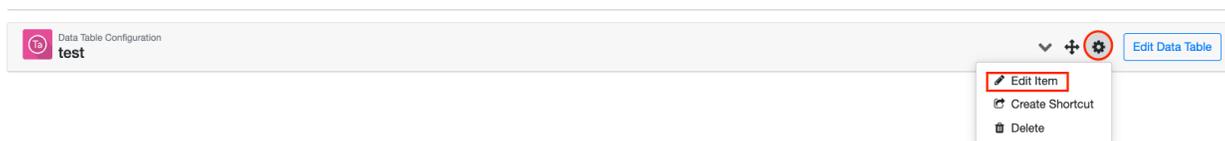
Label (required)

Description (optional)

Move To Category (optional)

My Favorite Data-Tables ⬍

Refresh the browser page to view your new category.

📁 Category
New Category   ✛ ⚙ Browse Category

ADDING DATA TABLES TO CATEGORIES (QUICK LINKS)

Click the **Action Gear** and **Edit Item f**or any data table in **My Data Tables.**

Data Table Configuration
test   ⌄ ✛ ⚙ Edit Data Table
                                                  ✏ Edit Item
                                                  ⮐ Create Shortcut
                                                  🗑 Delete

Under **Move to Category,** select the category from the drop-down menu, and click **Save**.
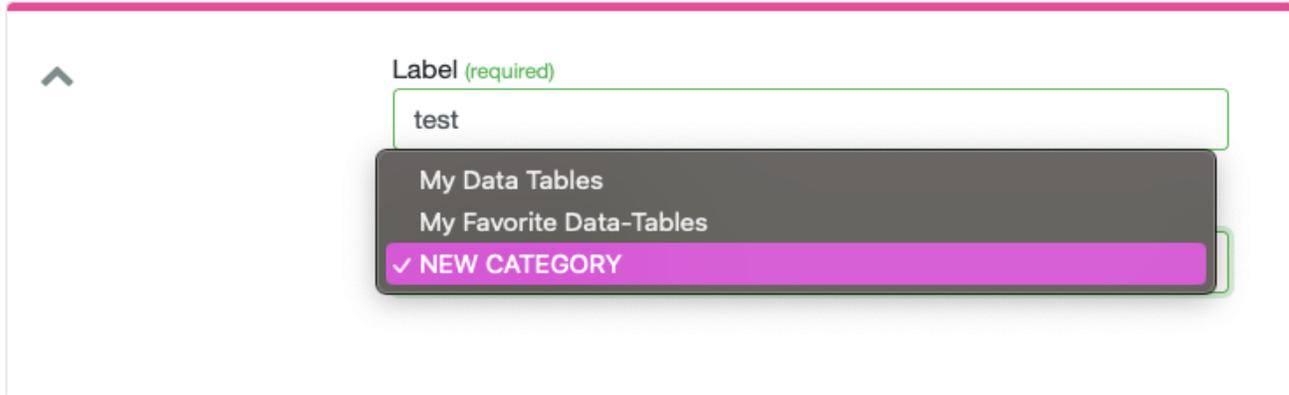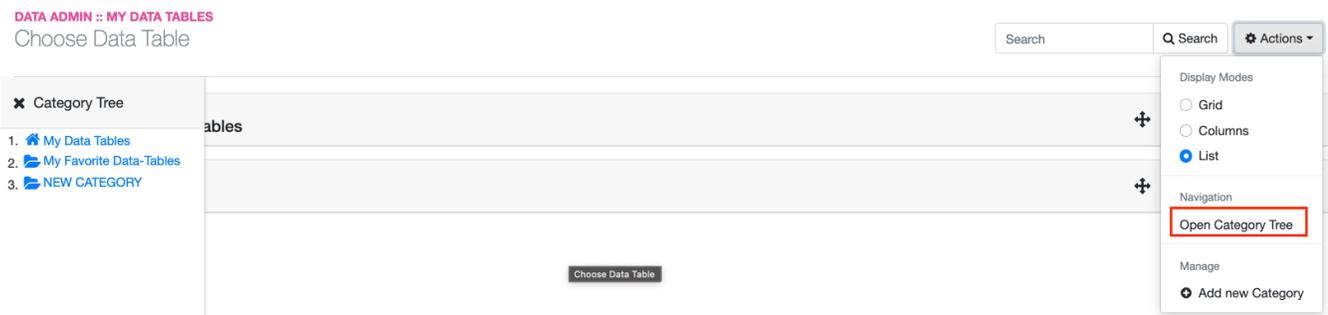

Refresh the browser page to see your changes.

## ALTERNATIVE NAVIGATION OF CATEGORIES IN MY DATA TABLES

([QUICK LINKS](#))

Navigate to the **Action Gear** at the right and choose **Open Category Tree** from the new window. This will open a Category Tree window to the left. Selecting any folder in blue will quickly navigate you to that folder. Click the "X" to close it.

COLLABORATE ([QUICK LINKS](#))

Navigate to **My Data Tables** and select the data table you want to copy or share. Next, select the blue **Edit Data Table** button.
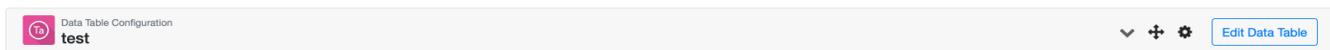
Then choose the **Collaborate Tab**.
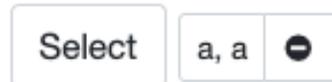

Here you will have multiple options.

Copy To ([QUICK LINKS](#))

Click Select, add Application Users by clicking the checkmark to the left of their name and then clicking the blue Apply button. Next, click Copy to Selected Users. A copy of the data table will appear in their saved "My Data Tables" NOTE: A copied chart may not be edited by the recipient.
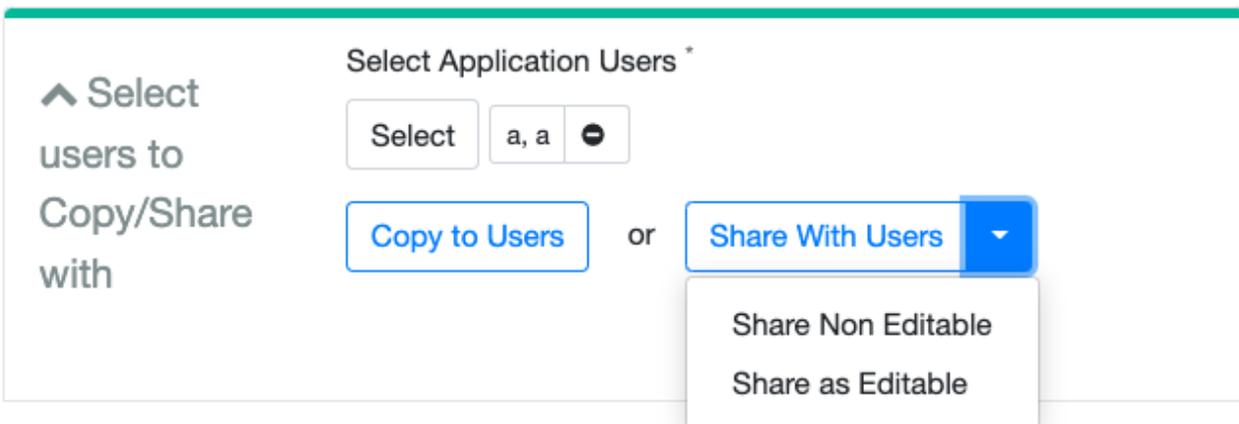

Share ([QUICK LINKS](#))

The data table can be shared as editable or non-editable. The recipient will receive the shared data table in their "My Data Tables" file in the Data Table Application. If the data table is shared as editable, the recipient can make changes to the configuration of the data table. These changes will also take effect in the original version. No notification will alert the recipient that a chart was shared with them.

Schedule ([QUICK LINKS](#))

Within the Data Table application is the ability to schedule reports to be delivered to a specific user or a group of users. The user receives an in-app and email notification to download the report(s) directly. A Data Table can be scheduled for different occurrences to meet your needs.

First, confirm you are scheduling within the correct school year. Next, click a date on the calendar for your first delivery, then select the time. The application will allow you to select more than one date. Continue to click any other dates/times you may wish the report to be delivered. When finished, click **Save and Continue**.

Use the **Add Recipient** button to view the selector. A new selector menu will appear at the bottom of the page.

Select a Role (optional - Administrator, Teacher, Specialist, Employee, Student) and Type (optional - All, Filter, Select) from the drop-down menus. Once you have selected the intended recipient(s), click **Save** to save your scheduling of the report. If you want to edit, delete or view the report, it can be found under **My Data Tables.**