

# **Categorize and Collaborate Data Tables**

## **QUICK LINKS**

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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.

data admin :: my favorite data-tables Choose Data Table		Search	Q Search	Actions -
			Display N	lodes
There are currently no items in this category.			⊖ Grid	
	Choose Data Table		<ul> <li>Colu</li> <li>List</li> </ul>	mns
			Navigatio Open Ca	n ategory Tree
			Manage 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**.

Label (required)	
Description (optional)	
Move To Category (optional)	
My Favorite Data-Tables	\$

Refresh the browser page to view your new category.



Browse Category

### ADDING DATA TABLES TO CATEGORIES (QUICK LINKS)

Click the Action Gear and Edit Item for any data table in My Data Tables.





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

Edit Item		Save X
^	Label (required)	
	My Data Tables My Favorite Data-Tables	
	✓ NEW CATEGORY	

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.

DATA ADMIN :: MY DATA TABL Choose Data Table	ES		Search		Q Search	Actions -
X Category Tree	ables			÷	Display Mo	odes nns
<ol> <li>My Favorite Data-Tables</li> <li>NEW CATEGORY</li> </ol>				÷	List     Navigation     Open Cat	tegory Tree
		Choose Data Table			Manage Add n	ew Category

### 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.

Data Table Configuration           test	~ +	٥	Edit Data Table	
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#### Then choose the **Collaborate Tab**.

Details	Configuration	Versions	Collaborate -	
			Сору То	
			Share With	
^			Distribute	equired)
			Schedule	
			Recipients	tion (ortional)
			· · · ·	

Here you will have multiple options.

### Copy To (<u>QUICK LINKS</u>)

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.

Select App	blication Users (optional)	Select Application Users (optional)					
Select		Select	a, a	•			
		Сору То	Selec	ted Users			

### 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.

▲ Select	Select Application Users *
users to Copy/Share with	Select a, a 🗢
	Copy to Users or Share With Users
	Share Non Editable
	Share as Editable



### Schedule (<u>QUICK LINKS</u>)

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**.

Test Undo Vave V								
D	etails Configuration	Versions	Collaborate -					Save & Continue
Set Delivery dates								
Date	Boundary Mode 😧	School Year *						
0 5	School Year O End Date	Select - 22/	23 🗢					
ma	month week day December 2022 today < >							
W	Sun		Mon	Tue	Wed	Thu	Fri	Sat
49		27	28	29	30	1	2	3
50		4	5	6	7	8	9	10
51		11	2	13 9a Scheduled Delivery	14	9a Scheduled Delivery	16	17
52		18	19	20	21	22	23	24
53		25	26	27	28	29	30	31

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

Test			Undo Save -
Details Configuration Versions Collab	orate *		
Select recipients for this Report Configuration.			Add Recipient
▲ Basic Settings	Exported Filename (optional)	Email Override (optional)	
	Email Subject (optional)		
	Email Content (optional)		
			<i>ă</i>
Role (optional) Type (optional)			
District Administrator	÷		W
All District Administrators			



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**.