

## Categorize, Collaborate, and Clone Charts

### QUICK LINKS

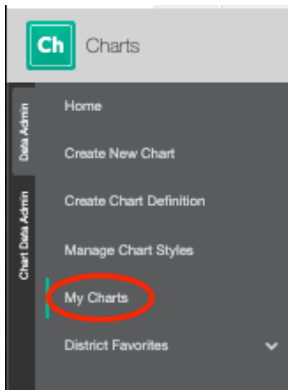
<a href="#">HOW TO CREATE AND USE CUSTOM CATEGORIES IN MY CHARTS</a>	<a href="#">ALTERNATIVE NAVIGATION OF CATEGORIES IN MY CHARTS</a>	<a href="#">CLONE</a>
<a href="#">ADDING CHARTS TO CATEGORIES</a>	<a href="#">COLLABORATE</a> <ul style="list-style-type: none"> <li>• <a href="#">Copy To</a></li> <li>• <a href="#">Share</a></li> <li>• <a href="#">Share</a></li> </ul>	

## HOW TO CREATE AND USE CUSTOM CATEGORIES IN MY CHARTS

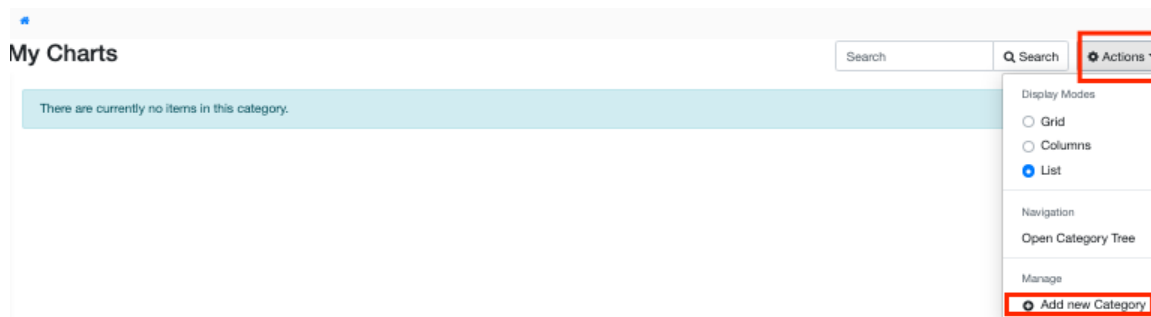
(Back to [QUICK LINKS](#) )

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

Navigate to the Charts application. Click **My Charts** 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](#) ✕

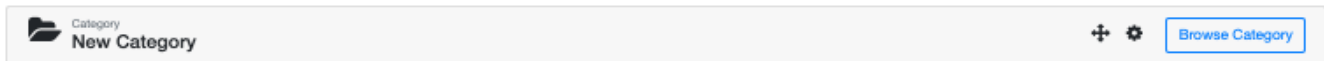
Label (required)

Description (optional)

Make Category Available in All Apps

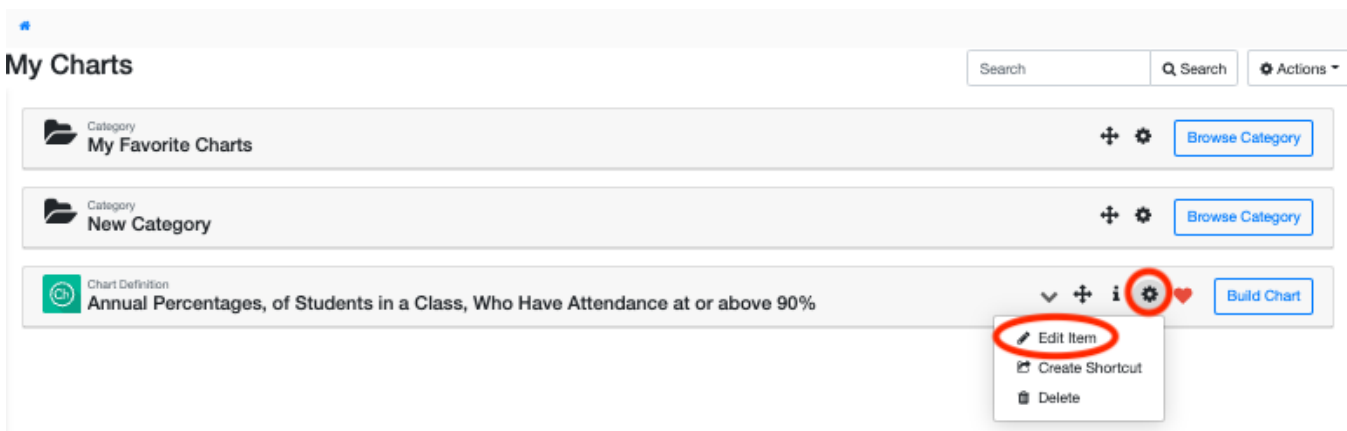
Move To Category (optional)

Refresh the browser page to view your new category.



## ADDING CHARTS TO CATEGORIES (Back to [QUICK LINKS](#))

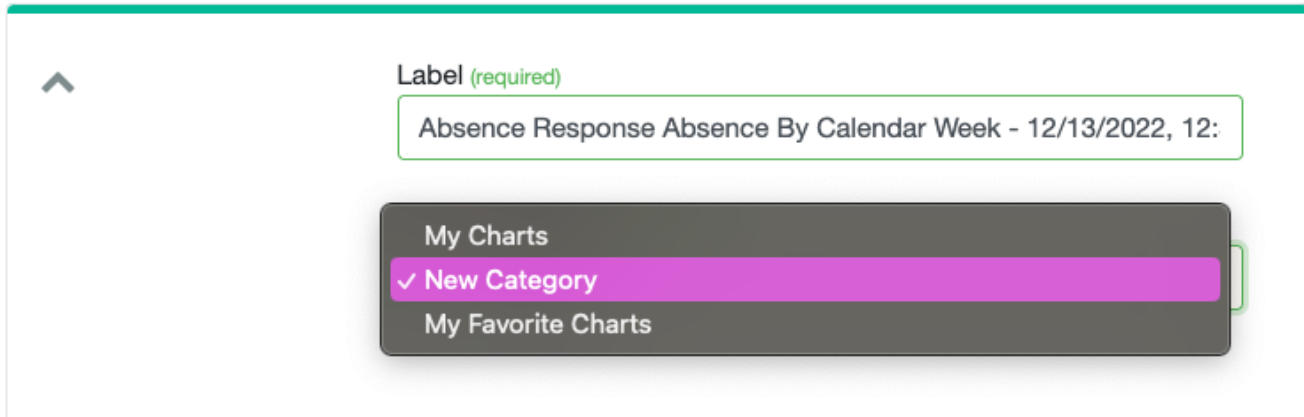
For any chart in My Charts, click the Action Gear and **Edit Item**.



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

Edit Item

✓ Save



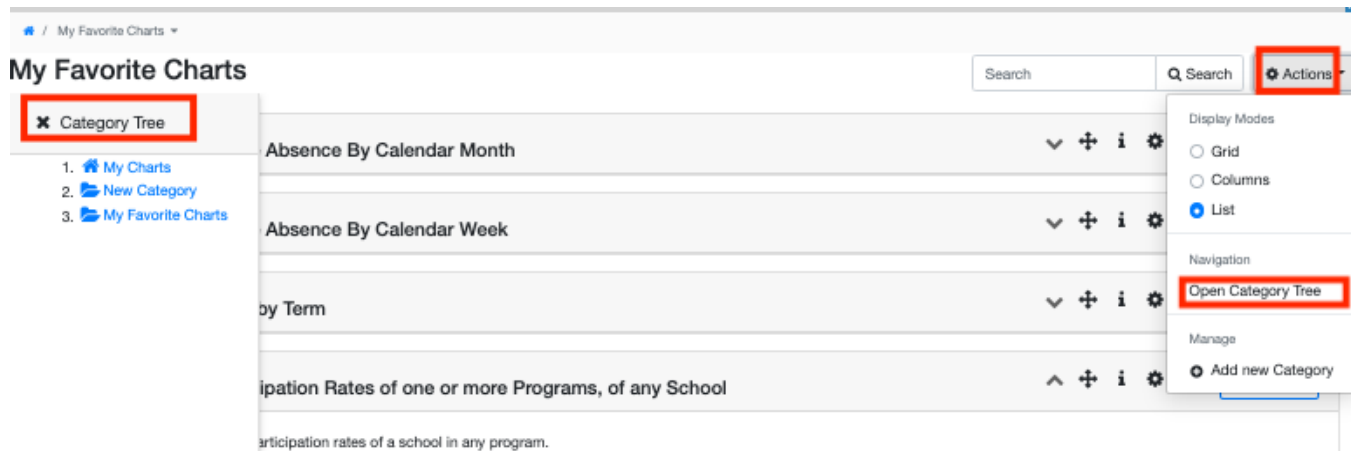
The screenshot shows the 'Edit Item' form. At the top left is an upward-pointing arrow. Below it is a 'Label (required)' field containing the text 'Absence Response Absence By Calendar Week - 12/13/2022, 12:'. Below the label field is a dropdown menu with three options: 'My Charts', '✓ New Category' (highlighted in purple), and 'My Favorite Charts'.

Refresh the browser page to see your changes.

## ALTERNATIVE NAVIGATION OF CATEGORIES IN MY CHARTS

(Back to [QUICK LINKS](#))

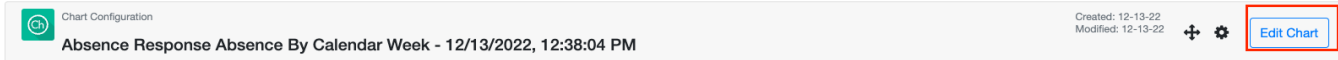
Navigate to the **Action Gear** at the right and choose **Open Category Tree** from the new window. This will open a Category Tree window to the left. Choosing any folder in blue will quickly navigate you to that folder. Click the "X" to close it.



The screenshot shows the 'My Favorite Charts' interface. On the left, there is a 'Category Tree' sidebar with a close button (X) and a list of categories: '1. My Charts', '2. New Category', and '3. My Favorite Charts'. The main area displays a list of charts with columns for chart name, expand/collapse, info, and settings. The 'Absence By Calendar Week' chart is selected. On the right, there is an 'Actions' menu with options: 'Display Modes' (Grid, Columns, List), 'Navigation' (Open Category Tree), 'Manage' (Add new Category), and 'Add new Category'. The 'Open Category Tree' option is highlighted with a red box.

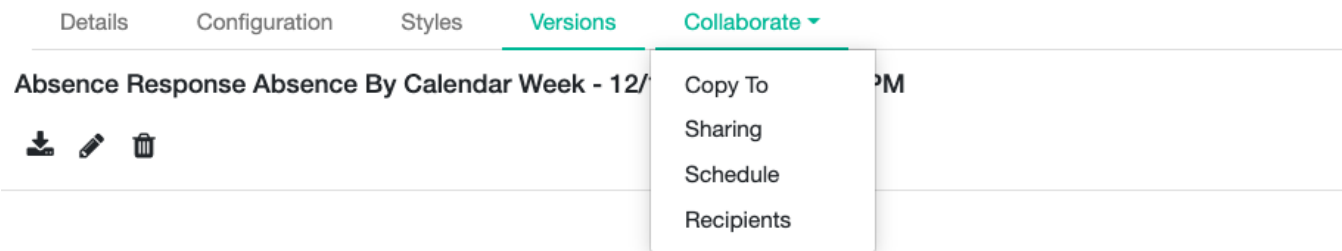
## COLLABORATE [\(Back to QUICK LINKS\)](#)

Navigate to **My Charts** and select the chart you want to copy or share. Select the blue [Edit Chart](#) button.



Then choose the **Collaborate Tab**.

Absence Response Absence By Calendar Week - 12/13/2022, 12:38:04 PM



Here you will have multiple options.

### Copy To

Select Application Users by clicking the checkmark to the left of their name and then selecting the blue [Apply](#) button. Then select [Copy to Selected Users](#). A copy of the chart will appear in their saved "My Charts" NOTE: A copied chart may not be edited by the recipient.

Select Application Users (optional)

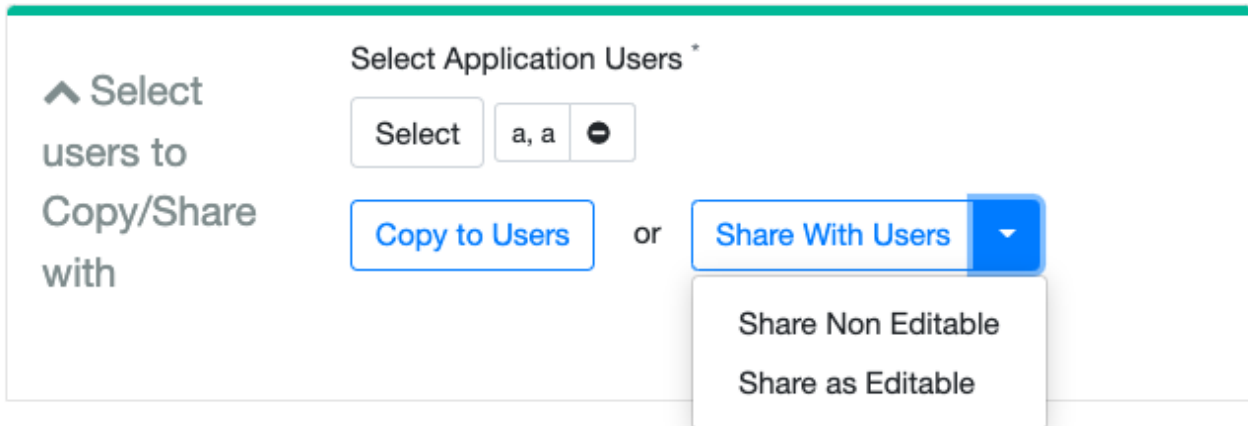


Select Application Users (optional)



### Share

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



## Schedule

Within the application of the charts 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 chart 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

Details Configuration Versions **Collaborate**

Set Delivery dates

Date Boundary Mode  School Year  End Date School Year

month week day

December 2022

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	12	13	14	15	16	17
52	18	19	20	21	22	23	24
53	25	26	27	28	29	30	31

today < >

Undo Save

Save & Continue  
Save & Exit

Schedule is Active

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 Collaborate

Select recipients for this Report Configuration. Add Recipient

Basic Settings

Exported Filename (optional)

Email Override (optional)

Email Subject (optional)

Email Content (optional)

Role (optional) Type (optional)

District Administrator All

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 chart scheduling. If you would like to edit, delete or view the report, it can be found under **My Charts**.

## CLONE (Back to [QUICK LINKS](#))

CLONE - Click the **Action Gear** and then choose **Clone Item**. Create a label, choose where you would like the file to be located, then click **Save**.

Chart Configuration

Absence Response Absence By Calendar Week - 12/13/2022, 12:38:04 PM

Created: 12-13-22 Modified: 12-13-22 + ⚙️ Edit Chart

- Edit Item
- Create Shortcut
- Clone Item
- Delete

You will now see a cloned version.

Chart Configuration

Absence Response Absence By Calendar Week - 12/13/2022, 12:38:04 PM

Created: 12-13-22 Modified: 12-13-22 + ⚙️ Edit Chart

Chart Configuration

Absence Response Absence By Calendar Week - 12/13/2022, 12:38:04 PM

Created: 12-13-22 Modified: 12-13-22 + ⚙️ Edit Chart