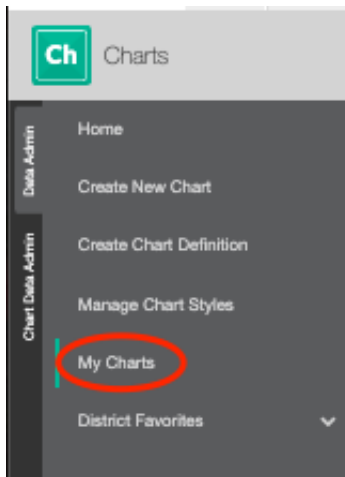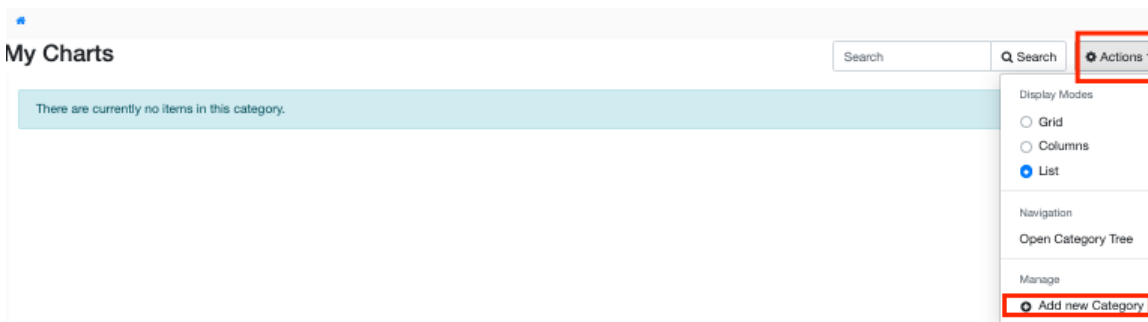# Categorize, Collaborate, and Clone Charts V2

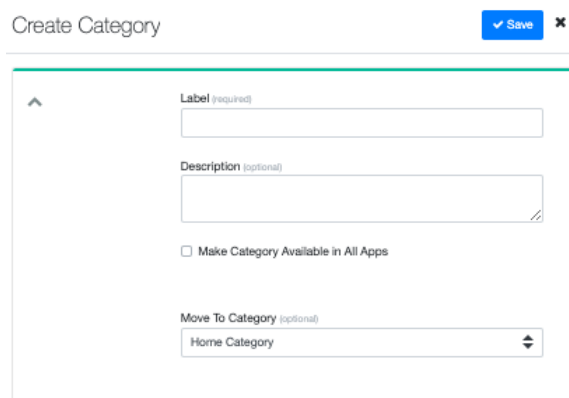Learn how to use the custom categories in My Charts to organize your items for easier access.

1. Navigate to the Charts application. Click **My Charts** on the left navigation menu.

2. Select the **Actions Gear** on the right and select **Add New Category.**

3. 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.**
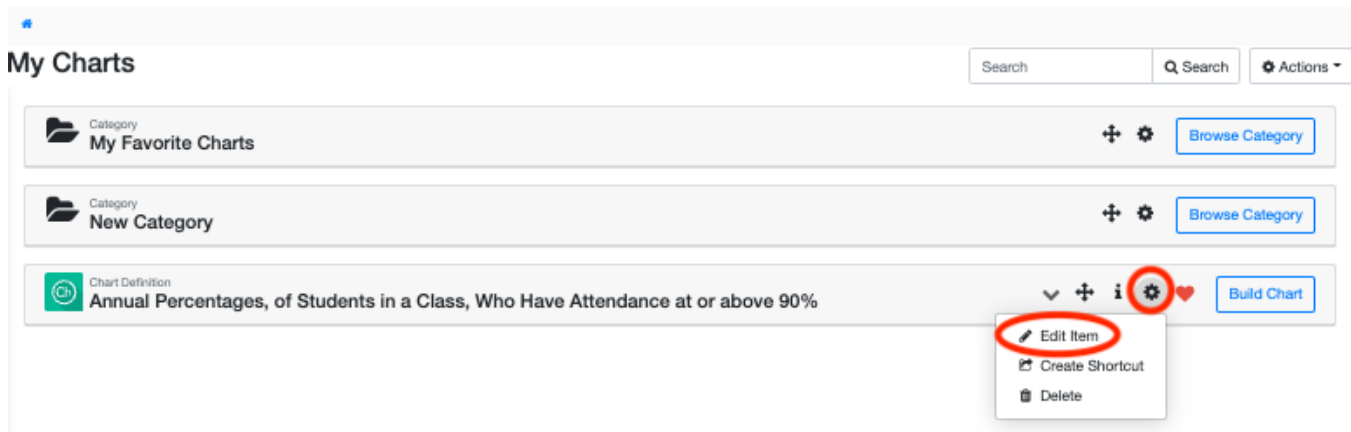
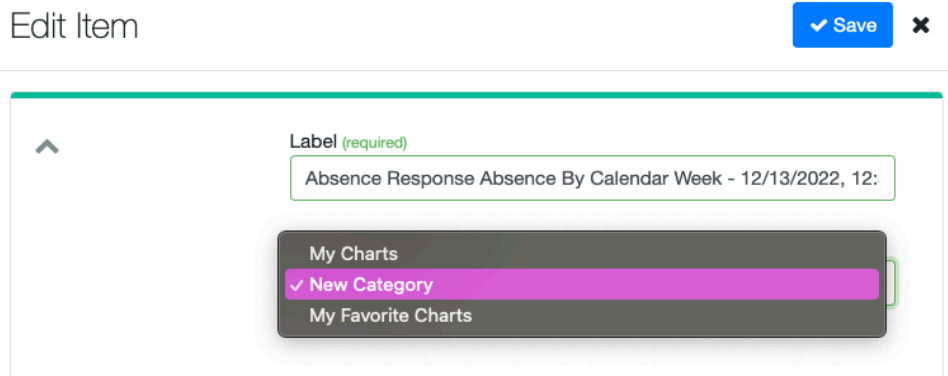4. Refresh the browser page to view your new category.
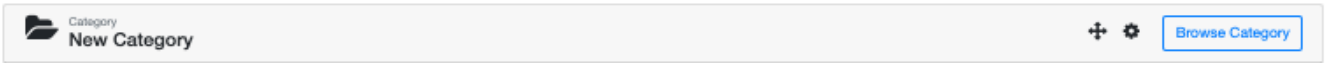
ADDING CHARTS TO CATEGORIES

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.

Refresh the browser page to see your changes.

ALTERNATIVE NAVIGATION OF CATEGORIES IN MY CHARTS

Navigate to the **Action Gear** on 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.
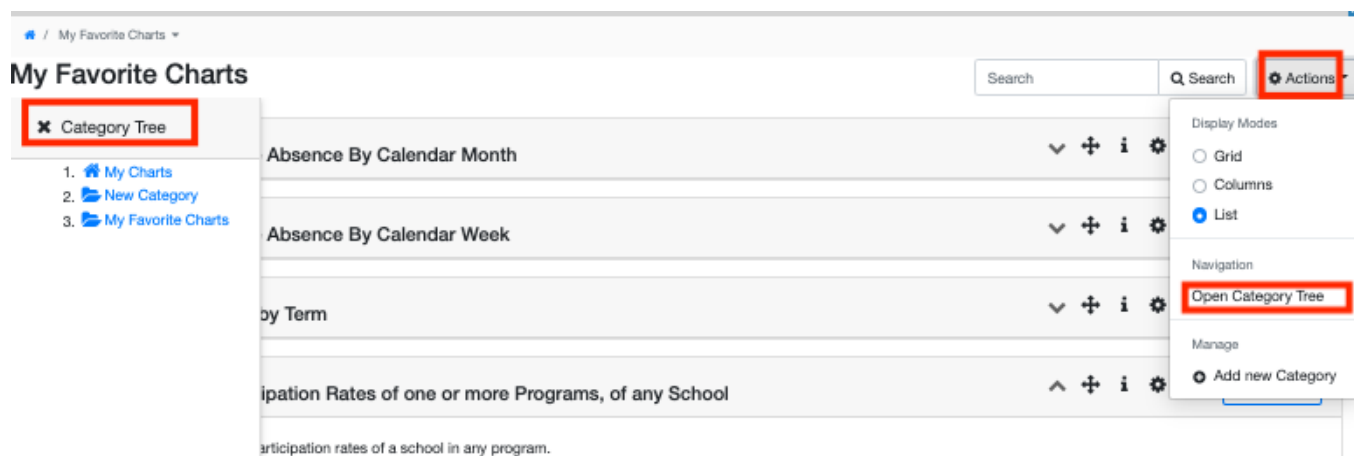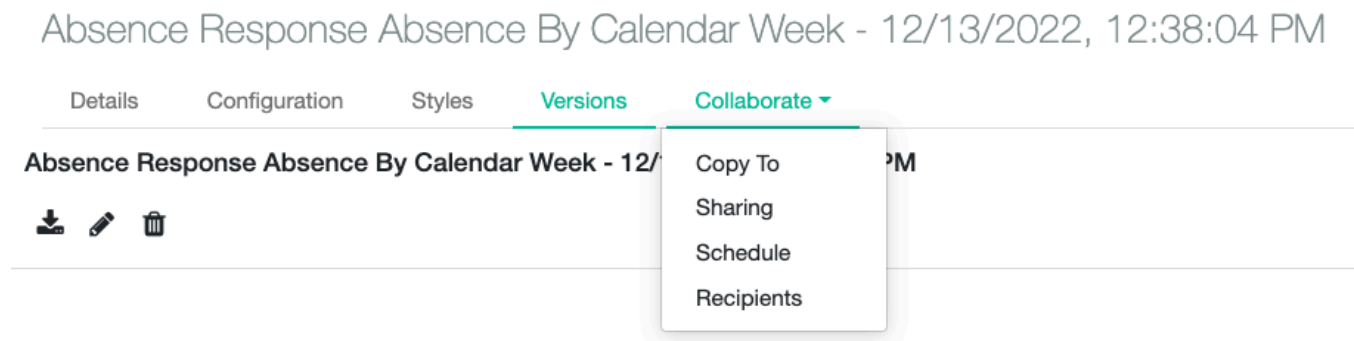
COLLABORATE

Navigate to **My Charts** and select the chart you want to copy or share. Select the **Edit Chart** button.
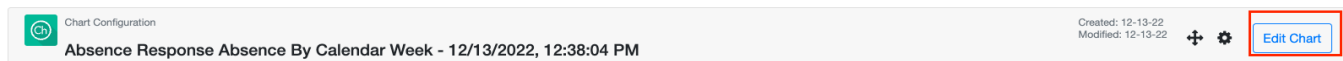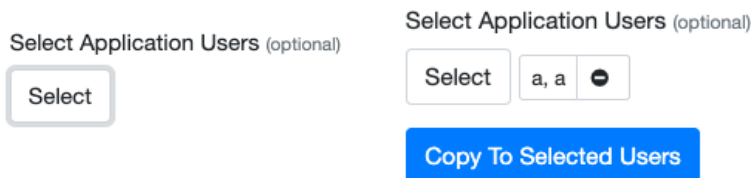

Then choose the **Collaborate Tab**.

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 **Apply button**. Then select **Copy to Selected Users.** A copy of the chart will appear in their saved "My Charts." **NOTE:** The recipient may not edit a copied chart.

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.**

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

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**.

You will now see a cloned version.