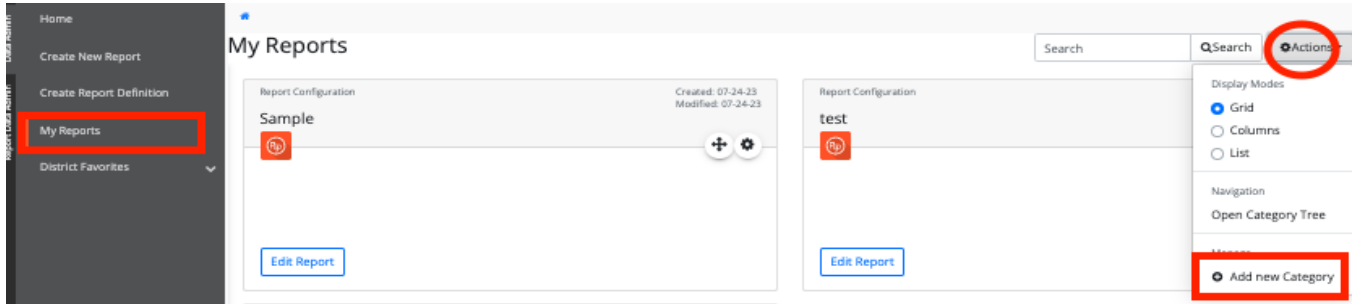


Categorize, Collaborate, and Clone Reports V2

Organizing Reports Using Custom Categories

1. Start under My Reports in the left navigation menu.
2. Select the **Action Gear** at the far right and choose **Add New Category**.

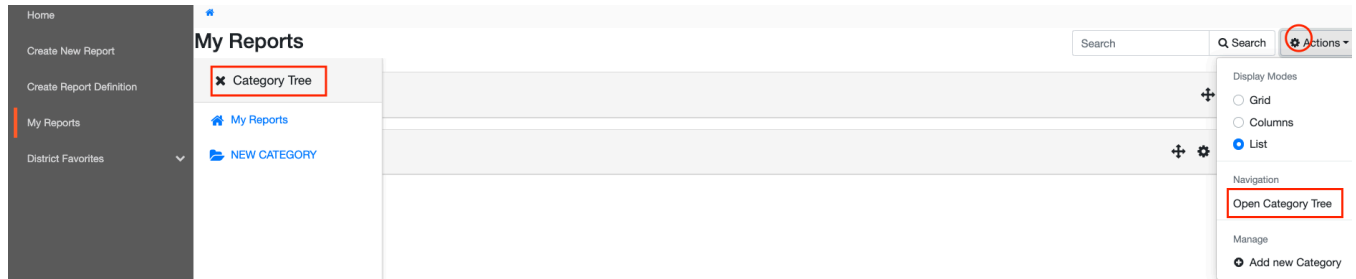


3. Fill in the category **Label** and **Description**. You can also nest the category under an existing one if needed. (**Parent Item**)
4. Click **Save** and refresh the browser page to view your new category.

A screenshot of the 'Create Category' form. At the top right is a blue 'Save' button with a checkmark and a close 'x' icon. The form contains several fields: 'Label (required)' with an empty text box; 'Description (optional)' with a larger text area; a checkbox for 'Make Category Available in All Apps'; 'Move To Category (optional)' with a dropdown menu showing 'Home Category'; 'Essentials' section with 'Item Category Label (required)' containing 'Aa' and 'Parent Item Category (optional)' with a search icon; and 'Item Category Description (optional)' with a large text area.

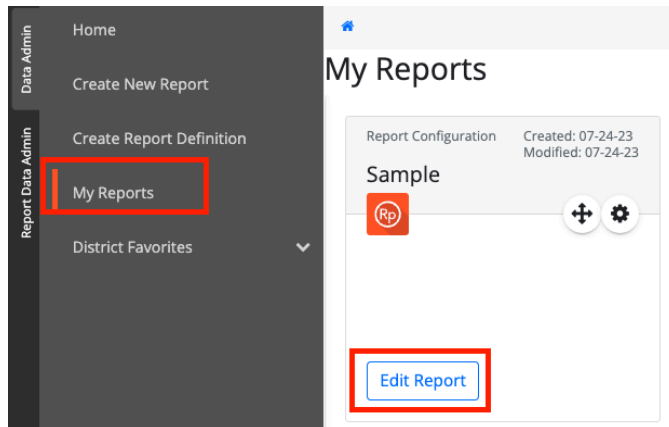
Alternative Navigation Using Category Tree

1. Click the **Action Gear** to the far right and choose **Open Category Tree**.
2. A Category Tree window will open on the left.
3. Click any **folder** to navigate to that category.
4. Close the tree by clicking the “x” icon.

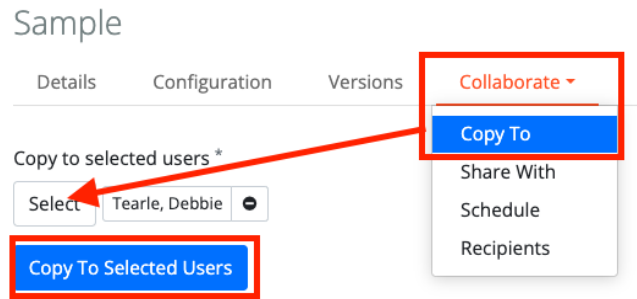


Collaborating with Reports

1. Start under **My Reports** in the left navigation menu and choose the report you want to copy.
2. Click the **Edit Report** button.

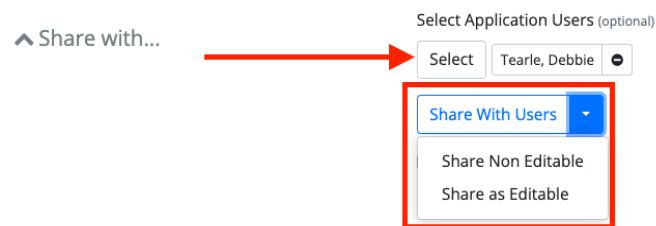


3. Select the **Collaborate** tab at the top of the page and choose one of the following options from the dropdown menu:
 - **Copy To:**
 - Click **Select**, select one or more **checkmarks** to the left of the user, and then click **Apply**.
 - Click **Copy to Selected Users**.
 - The report will be copied to their My Reports, but they will not be able to edit it.



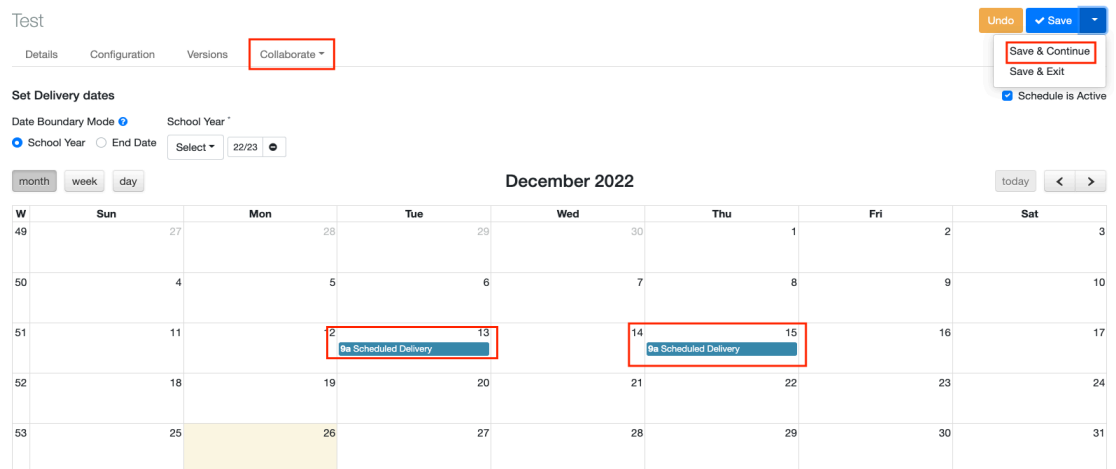
○ **Share With:**

- Click **Select**, select one or more **checkmarks** to the left of the user, and then click **Apply**.
- Choose whether to share the report as **Editable** (The recipient can make changes, which will reflect in the original version.) or **Non-Editable** (The recipient cannot modify the report.).
- The recipient will view the shared report in their **My Reports** section. No notification will alert the recipient that the report has been shared.



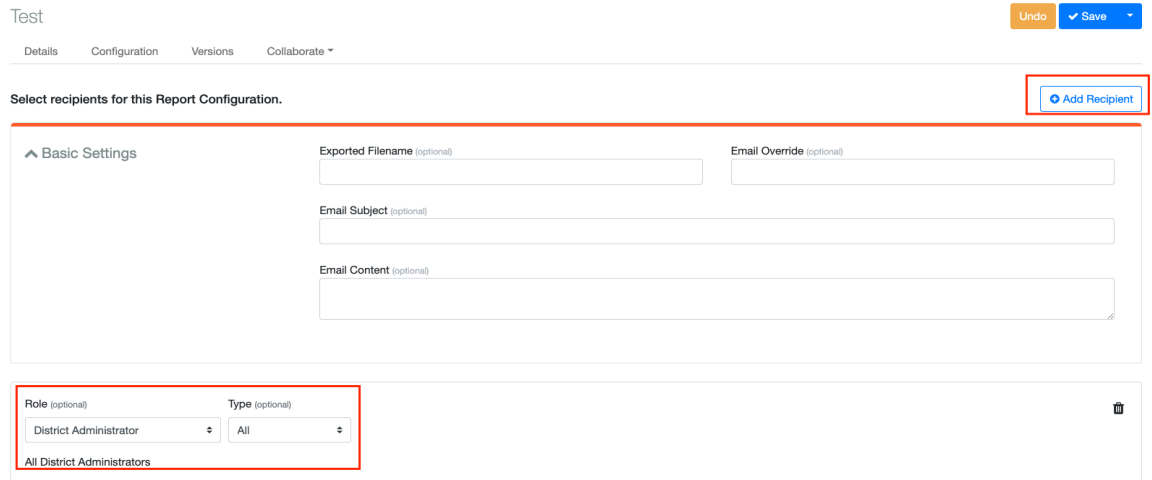
○ **Schedule:**

- Confirm you are scheduling for the correct **school year**.
- Select a **date** on the calendar for the first delivery and set the **time**. You can choose multiple dates and times if necessary.
- Click **Save** and **Continue** in the top right.



○ **Recipient:**

- Use the **Add Recipient** button in the top right to select who should receive the scheduled report.
- Scroll to the bottom of the page and choose a **Role** (e.g., Administrator, Teacher, Specialist) and **Type** (All, Filter, Select) from the dropdown menus.
- Click **Save** in the top right to schedule the report.
- To view, edit, or delete the scheduled report, go to My Reports.



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

Cloning a Report

1. Start under **My Reports** in the left navigation menu.
2. Click the **Action Gear** to the right of any report and select **Clone Item** from the dropdown menu.
3. Give the clone a new **Label** and choose where to save it.
4. Click **Save** to create the clone. You will now see the cloned version in My Reports.

