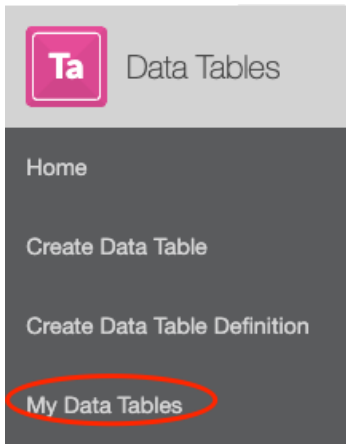


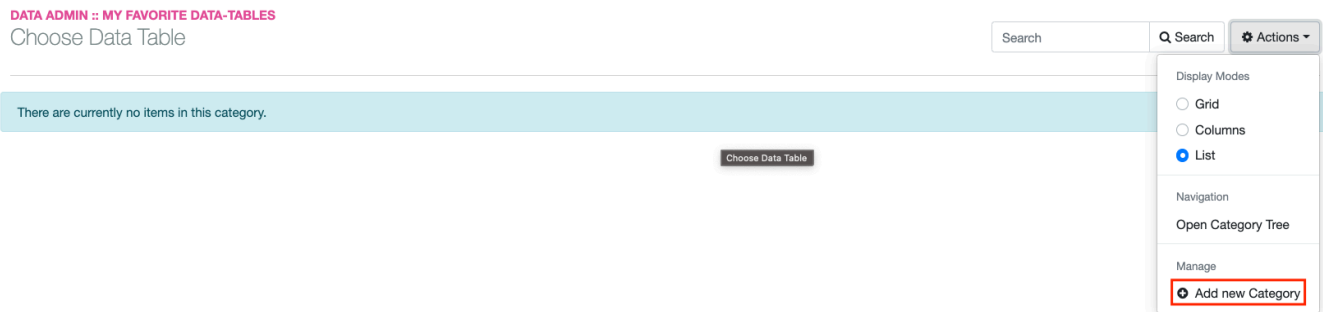
Categorize and Collaborate Data Tables V2

Discover how to utilize custom categories in **My Data Tables** to efficiently 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**.

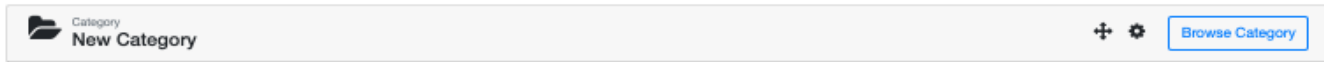
Create Category ✓ Save ✕

Label (required)

Description (optional)

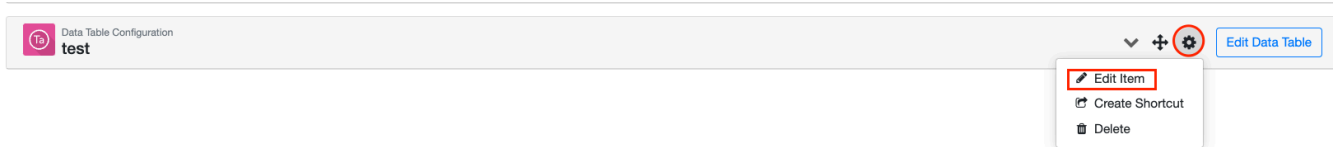
Move To Category (optional)

Refresh the browser page to view your new category.

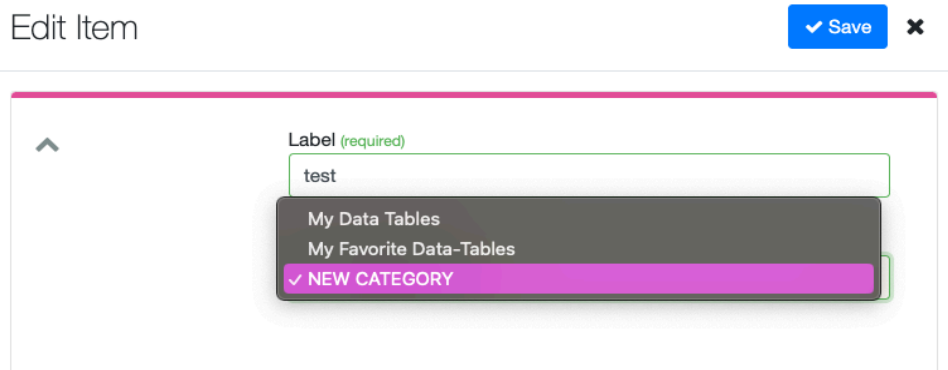


ADDING DATA TABLES TO CATEGORIES

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



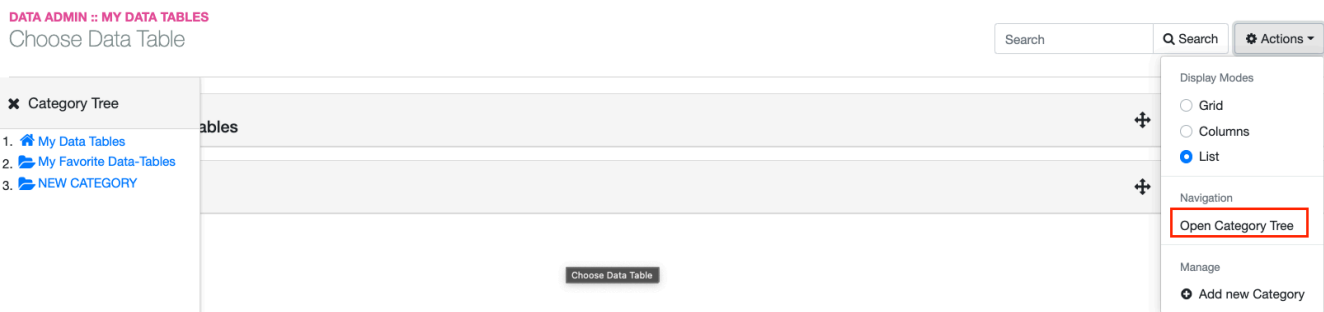
Under **Move to Category**, select the category from the drop-down menu, and click **Save**.



Refresh the browser page to see your changes.

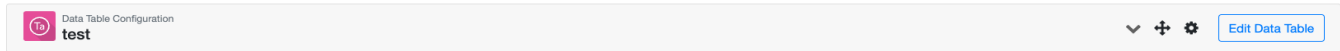
ALTERNATIVE NAVIGATION OF CATEGORIES IN MY DATA TABLES

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. Selecting any folder in blue will quickly navigate you to that folder. Click the "X" to close it.

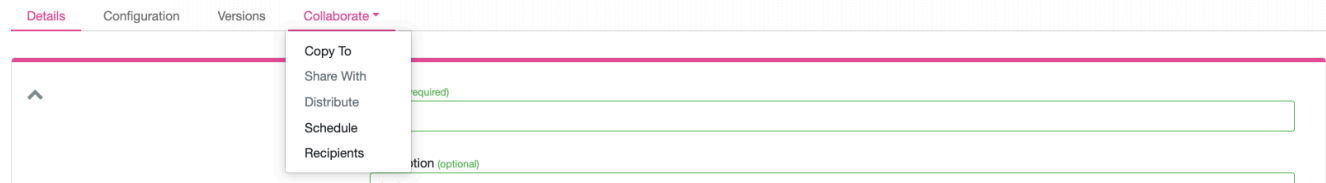


COLLABORATE

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



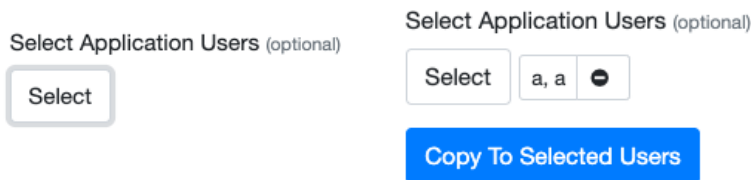
Then choose the **Collaborate Tab**.



Here you will have multiple options.

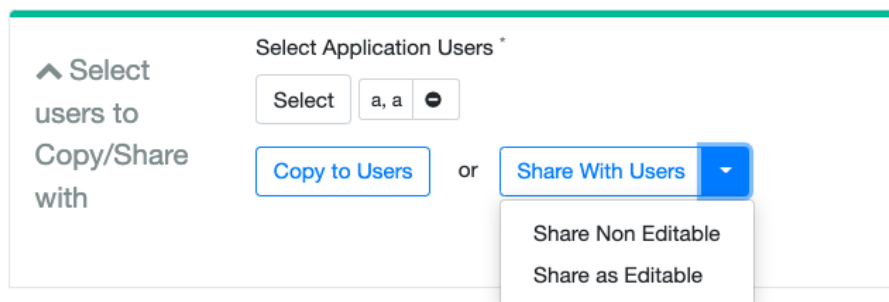
Copy To

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:** The recipient may not edit a copied chart.



Share

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 modify the data table 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 Data Table application, you can 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

Details Configuration Versions Collaborate

Undo Save

Save & Continue
Save & Exit
 Schedule is Active

Set Delivery dates

Date Boundary Mode School Year End Date School Year

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	12	13	14	15	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

Details Configuration Versions Collaborate

Undo Save

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 report schedule. To edit, delete, or view the report, it can be found under 'My Data Tables'.