

TABLE OF CONTENTS

OVERVIEW	
Access	4
Signing In	5
Navigation	6
Function Bar	7
Course Selector	8
Information Bar	9
Action Bar	10
Quick Action Links	11
Navigating Between Semesters	12
Grade Calculation Process	14
GRADEBOOK SETUP/CUSTOMIZATION – START OF THE YEAR	
Settings	18
Options	19
Display Settings	20
 Assignment Filter & Defaults 	22
 Login Defaults 	23
Grade Scale	24
Category	25
Creating Category Group	25
 Deleting Categories 	27
Seating Chart	28
Gradebook Setup	29
Merging Classes	32
 Un-Merging Classes 	34
ASSIGNMENTS	
Add Assignments	35
Creating Assignments	38
 Extra Credit Assignments 	38
 Creating an Exam Assignment 	38
Mass Assign	39
Deleting Assignments	43
Default Screen – Class List	44
ATTENDANCE	
Daily Attendance	46
Posting by Seating Chart	46
All Are Accounted	46
• Notes	46
GRADEBOOK	
Features	47
Action Bar	47
o Sort	47
o Email	48
o Print	49
o Notes	49
o Drop Feature	50
o Wide View	50

 Information Icon 	51
o Filter	51
• Views	52
 By Student 	52
 By Assignment 	52
 Category View 	53
o GP View	54
View Different Quarter	54
Assignment Header	54
Category Colors	55
Student Indicators	55
Name Hover	56
GRADES	
Posting	57
Assignment Grades	57
 Entering per student 	57
 Mass Assign 	57
o Grade Codes	58
Mid Quarter/Progress	59
 Middle & High Posting 	59
 Elementary Progress Reports 	60
View Prior	62
STUDENTS	
Accessing Student Information	63
 Contacts 	64
 Schedules 	65
 Assignments 	66
 Missing Assign Feature 	66
Attendance	67
Testing	68
Transcript	68
Health	69
Discipline	69
REPORTS	
Overview Screen	70
Overview Setup	71

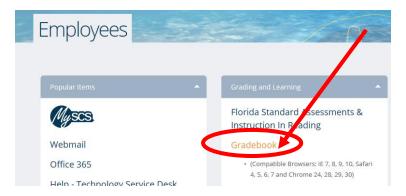
Access

There are 4 ways to enter Gradebook:

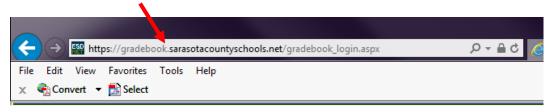
- Use/Create your short cut on your desktop
- From My SCS click on the link



From the district website click on the Employees icon and then choose the Gradebook link



• In a supported Internet browser, such as IE, Safari, Chrome, or Firefox, enter the URL: https://gradebook.sarasotacountyschools.net



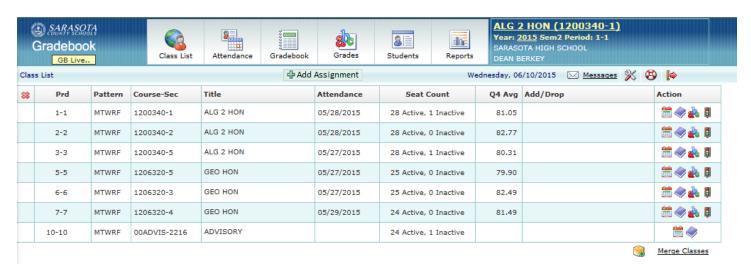
When arriving at the sign-on screen please use your Active Directory sign in.

(Active Directory sign in = A# and network password which is what you use to sign in to your computer)

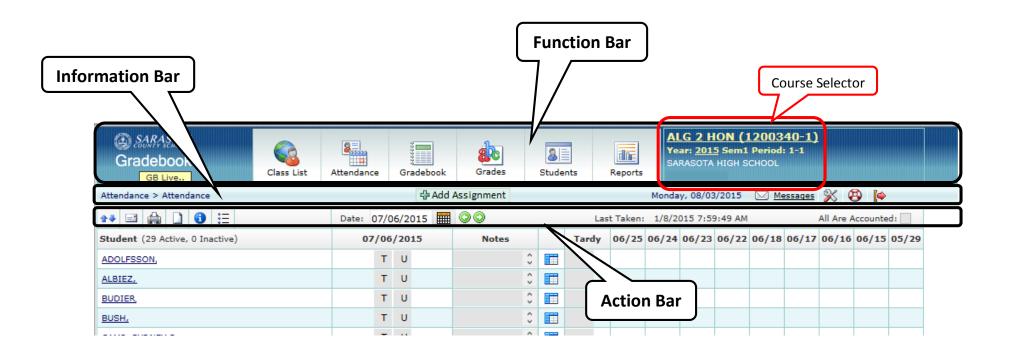
Click Sign-in or click the Enter key



Once signed in the screen below will appear.

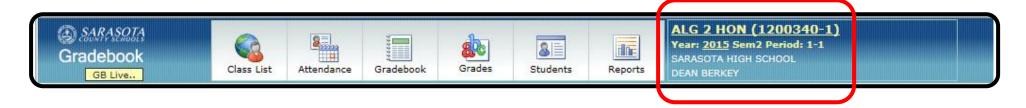


Navigation:



Function Bar

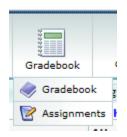
The icons on the **Function Bar** allow you to view information and perform functions for the class selected in the course Selector. The **Course Selector** allows you to choose a class, semester, year, and school (if you have been given access to more than one).

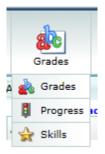


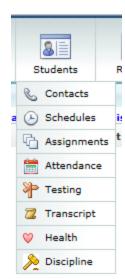
Hovering over the title in the icon box will underline it and then it can be clicked on to either open a dropdown or take you directly to that screen.













^{**} You will notice that some of the links in the action column on the class list screen match the links under the icons on the function bar

Course Selector

The **Course Selector** is part of the Function Bar. Click on the underlined 'No course selected' to select a class and/or a term.

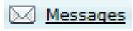


The semester is indicated under the course selector. Once a class is selected it will show in the function bar along with the year, term and period that particular course section is scheduled.



Information Bar

Located directly beneath the function bar, the **Information Bar** displays the title of the current screen you are on and current date. In the middle of the bar is the Add Assignments button. No matter what screen is currently displaying, an assignment can be added to a class at any time. The icons on the right of the bar do the following:



Messages – (*Not currently being used*) Allows office or Gradebook Admin to send teachers system messages by school. Will indicate a message by a number in parenthesis (1).



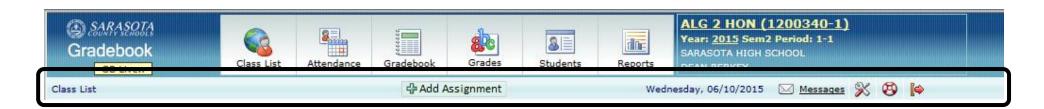
Settings – Has several sub-categories which are used to personalize & setup your gradebook for the year.



Help – This is the Vendors help feature which redirects you to their generalized Wiki. Please refer to the district's personalized detailed handbook when questions arise about using Gradebook.

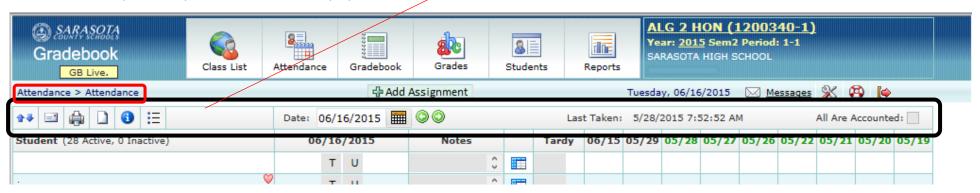


Logout – Clicking on this icon will log you out of the Gradebook.



Action Bar

The **Action Bar** is specific only to the screen name displayed in the Information Bar. The Attendance screen is shown below.

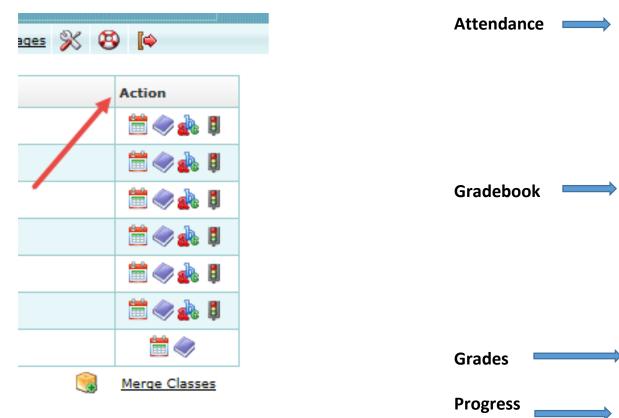


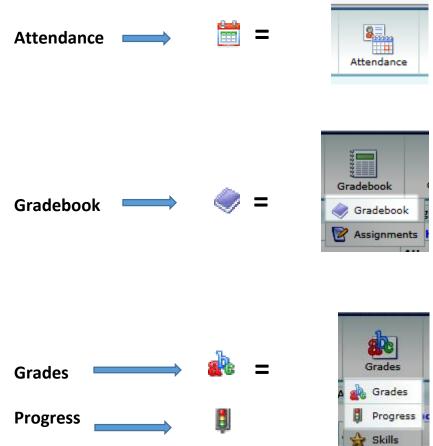
There are several icons on the actions bar which are reoccurring on most screens. Below is a full list of icons found throughout the Gradebook screen on the action bars.

44	Sort	Gives you different sorts for your class list on the gradebook screen only. Can also
		create your own.
=:	Email	Email students, parents, & emergency contacts in mass or individual. Able to send
		attachments and mass email weekly progress reports.
	Print	Print a gradebook report for all students or individuals. Also can export to excel.
	Notes	Notes can be entered for individual students. Within the note it can be linked to a
		category and a status must chose indicating who can view it.
*	Drop Lowest Grade	Allows you to set up how you would like to drop the lowest grade for the class.
H]-c ←→	Wide View	Expands the columns to a wider view.
1	Information	A brief description of the grade codes used for assignment grades.
Y	Filter	Assignment filter
:=	Views	Gives a list of different views for the gradebook information.

Quick Action Links

Located on the Class List screen the quick Action links will take you to the same places the icons do in the function bar as indicated below.





Navigating Between Semesters

At the semester changeover, you may find it necessary to switch between semesters for the purpose of wrapping up grading in semester one, while setting up and entering grades in semester two.

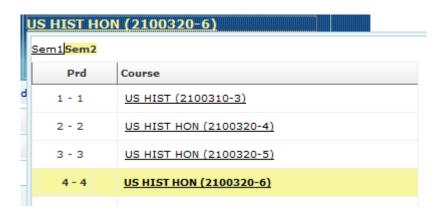
There are several features in the Gradebook that determine which information is displayed. Understanding the features detailed below will help you to setup and navigate your gradebook efficiently.

On the top right side of the Gradebook, just above your name and school, is a Year and Semester indicator. In the example below, it tells that this user is in the 2016 school year and viewing Semester 1 data.

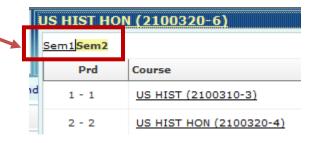


To switch to another semester you must use the Class Selector feature, which is located at the top right corner of the Gradebook.

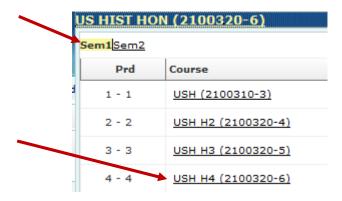
1. Left click on the <u>Course Selector</u> and a list of your classes will display. This list, in the example below, is a second semester list of classes.



2. Located within the Course Selector drop down list are Sem 1 & Sem 2. The highlighted Sem, which is not underlined, indicates which Semester the Gradebook is currently showing.

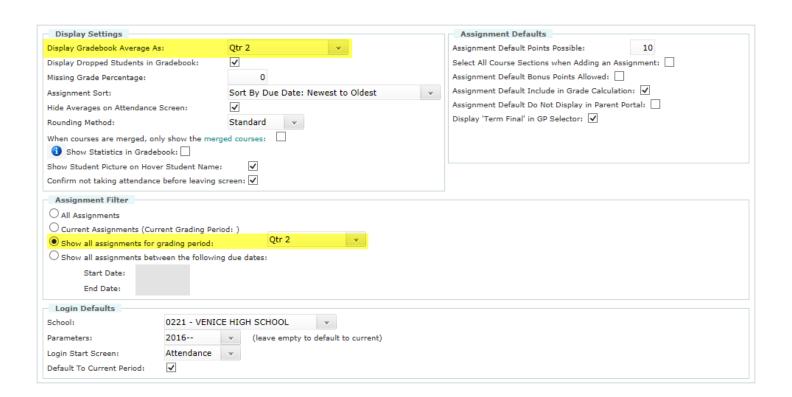


3. To switch to another semester, left click on the semester that you want to view the Class List for and click on an underlined course from the list below. This will display all classes in the Semester you have chosen on the class list screen.



Within the Gradebook, you can limit the assignments that display to any grading period.

- 1. Click on the Settings icon 3, and then select **Options**.
- 2. Use the **Assignment Filter** options to limit or select which assignments show within the Gradebook. Assignments can be filtered by current marking period, by a selected marking period, or by date.
- 3. Another option which affects the display of grade data in the Gradebook is the "Display Gradebook Average As:" setting. This drop down menu sets the grade, either marking period or semester that will display in the summary column within the Gradebook.



Grade Calculation Process

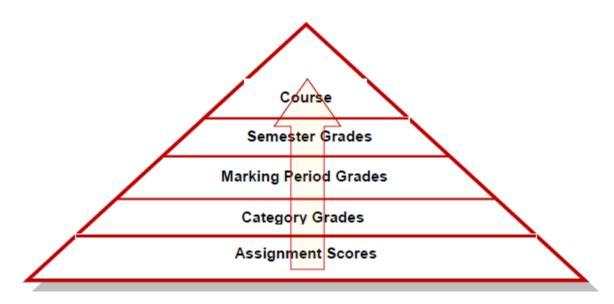
Some Terminology

Marking Period = any calendar period for which an official grade is calculated. Example: Quarter or 9 Weeks or GP1, GP2.

Term = Semester

The Grade Rollup Process

The diagram below is an example of a traditional grade rollup path.



• Calculating a category grade from assignment scores

Category grades are calculated from raw scores entered as assignment grades. Each assignment can also be weighted to provide additional grade impact.

The below formula illustrates how a category grade is calculated:

Category grade = (Assignment Score * Weight) / Sum of (Assignment Points * Weight) * 100

$$(((24*2) + (20*1) + (96*1)) / ((25*2) + (25*1) + (100*1))) * 100 = 93.71$$

Points Earned Points Possible

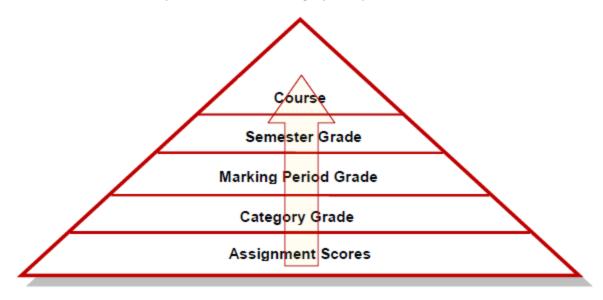
• Calculating a marking period grade from category grades

Categories are groups of similar assignments such as "Homework" or "Quizzes".

Categories can be either weighted (See Weighted Averaging calculation explanation below) or non-weighted (see Total Points explanation below).

Weighted Averaging (when weighted categories are used):

The grade rollup process looks like the example below when using weighted categories. For details on creating categories, refer the section "Step Three - Create a Category Group".



The *Gradebook* uses the following *formula* to calculate a marking period grade when category weighting is used.

Student Marking Period Average = Total Score / Total Category Weights Used

Where *Total Score* is calculated as follows:

((Sum of (Assignment Score * Weight / Assignment Points * Weight)) * Category 1 Weight percentage)

Plus

((Sum of (Assignment Score * Weight / Assignment Points * Weight)) * Category 2 Weight percentage)

.... Plus

((Sum of (Assignment Score * Weight / Assignment Points * Weight)) * Category n Weight percentage)

And so on for as many categories as you have setup. Each Category weight may vary. In the above example, the categories could represent Homework, Quizzes, and Test scores. Homework and Quizzes might be assigned the same weight, but test scores might have a different weight. You can choose to define as many categories as needed.

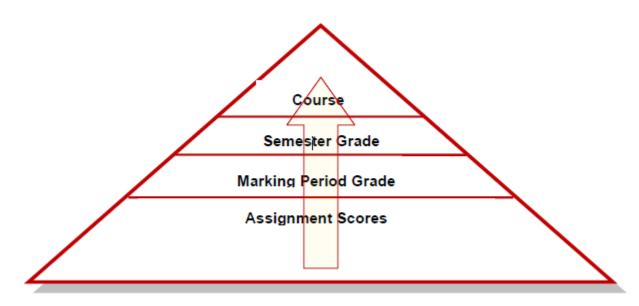
Example using Weighted Averaging (Weighted Categories):

Categories	Employability (5%)	Homework (20%)	Quizzes (25%)	Tests (50%)
Assignments	(22/22) = 100	(24/24) = 100	(96/100) = 96	(98/100) = 98
(Points Earned/				
Points Possible)				
		(95/100) = 95	(88/100) = 88	
		(20/20) = 100		
		(92/100) = 92		
Score	(100*5%) = 5	((231/244)*20%) = 18.93	((184/200)*25%) = 23	(98*50%) = 49
Marking Period Grade	(5+18.93+23+49) = 95.93			

Total Points (When categories are not weighted):

If you do not weight the categories, then you are effectively using a <u>Total Points</u> grading system. For details on creating categories, refer the section "Create a Category Group".

In a Total Points grading system, the assignment total points contribute directly to the marking period grade. Categories only assist to aid in classifying assignments by type and do not determine the percent each type of assignment contributes to the marking period grade.



The Gradebook uses the following formula to calculate a marking period grade when non-weighted categories:

Student Marking Period Average = Sum of (Assignment Score * Weight) / Sum of (Assignment Points * Weight)

Example using Total Points (Non-weighted Categories):

Categories	Employability	Homework	Quizzes	Tests
Assignments	22/22	24/24	96/100	98/100
(Points Earned/Points Possible)				
		95/100	88/100	
		20/20		
		92/100		
Points	22/22	231/244	184/200	98
(Points Earned/Points Possible)				
Marking Period Grade	(535/564) * 100 = 94.85			

• Calculating a semester (term) grade from marking period grades

Depending on district grading policy, the marking period (also called grading period, quarters, etc.) may or may not be adjustable as to what percent (weight) the marking period grade will contribute to the semester (term) grade.

Semester grade = Sum of ((Marking Period 1 * Weight) + (Marking Period 2 * Weight) + (Exam * Weight)) / (Marking Period 1 Weight) + (Marking Period 2 Weight) + (Exam Weight)

For detailed information on setting up assignments, categories, and marking periods – refer to the section "Gradebook Setup/Customization".

GRADEBOOK SETUP & CUSTOMIZATION – Start of the Year

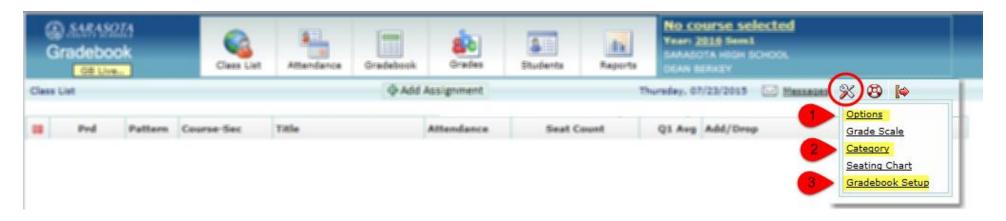
Settings

REQUIRED:

- 1. Set Preferences on the **Options** screen
- 2. Create **Category** group which will be assigned to your classes to be able to create assignments for classes.
- **3.** Go to **Gradebook Setup** to assign the category group(s) to each of your classes for both terms listed.

Optional features:

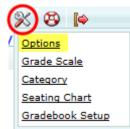
- Merging classes which MUST be done PRIOR to creating/adding assignments. This feature is found on the Class List screen.
- Create **Seating Charts** for attendance purposes. It's a very helpful item for when you have a substitute.



Options

On the **Information Bar** click **Settings**, then from the dropdown choose **Options**. The screen below should appear.



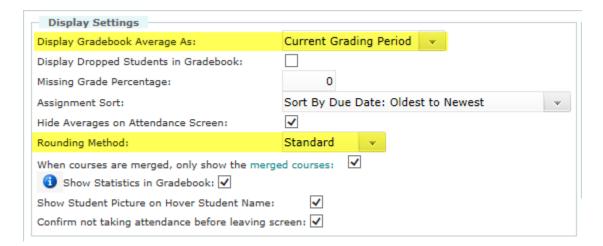


There are four areas to the options screen: Display Settings, Assignment Defaults, Assignment Filter, & Login Defaults. There are only a few settings in each area that are required to start using the Gradebook. At any time all of the settings can be changed just remember to log out and back in for the changes to take effect.

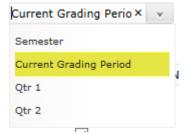
	V				
Display Settings		- Assignment Defaults -			
Display Gradebook Average As:	Current Grading Period 💌	Assignment Default Points Possible: 100			
Display Dropped Students in Gradebook:		Select All Course Sections when Adding an Assignment:			
Missing Grade Percentage:	0	Assignment Default Bonus Points Allowed:			
Assignment Sort:	Sort By Due Date: Oldest to Newest	Assignment Default Include in Grade Calculation:			
Hide Averages on Attendance Screen:	✓	Assignment Default Do Not Display in Parent Portal:			
Rounding Method:	Standard v	Display 'Term Final' in GP Selector: ✓			
When courses are merged, only show the merge	ed courses: 🔽				
Show Statistics in Gradebook:					
Show Student Picture on Hover Student Name:	✓				
Confirm not taking attendance before leaving so	rreen: 🗸				
- Assignment Filter -					
○ All Assignments					
Current Assignments (Current Grading Perio	© Current Assignments (Current Grading Period:)				
O Show all assignments for grading period:					
O Show all assignments between the following	due dates:				
Start Date:					
End Date:					
Login Defaults					
School: 0051 - SARASOTA HIGH SCHOOL 🔻					
Parameters: (leave empty to default to current)					
Login Start Screen: Class List 💌					
Default To Current Period:					

Display Settings

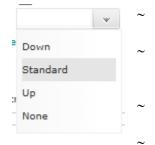
The highlighted items must be set to use the gradebook. All other items are optional but extremely helpful settings.



<u>Display Gradebook Average As</u> – Sets which grade average, either semester (Term) or marking period (quarter), will display in the grade summary columns in the Gradebook. ALWAYS choose 'Current Grading Period' from the drop down. This will allow your gradebook to move from one grading period to another automatically to make assignments grade entry seamless.



<u>Rounding Method</u> – Rounding in the Gradebook is not applied to individual assignments, but to the <u>Marking Period (quarter) and Progress grades ONLY</u>. The rounding preference is a global setting that affects all of the classes assigned to you.



Down: Rounds down no matter what the decimal is. Example 89.9 will remain an 89.

Standard: Rounds to the nearest whole number. Example 89.5 rounds to 90 and 89.4 round to 89. (DEFAULT)

Up: Rounds up no matter what the decimal is. Example 89.8 will round to 90.

None: (DO NOT USE) This does NOT round and leaves the decimal in the posted grade column which is not allowed according to our grading scale.

Display Settings	
Display Gradebook Average As	Sets which grade average, either semester (term) or marking period, will display in the grade summary columns in the Gradebook. Should always choose 'Current GP'.
Assignment Default Points Possible	Sets the default total points when adding a new assignment
Display Dropped Students in Gradebook	Turns on/off the display of inactive students in the Gradebook and Grades screens.
Missing Grade Percentage	Sets the numeric value that will be entered when a /M code is used on the Gradebook screen.
Assignment Sort	Various display option for the assignments in the Gradebook. Options such as By Category Alphabetical, Then By Assignment Due Date.
Hide Average on Attendance Screen	Allows the user to suppress the marking period (quarter) grade average column on the attendance screen.
Rounding Method	Rounding in the Gradebook is not applied to individual assignments, but to the Marking Period (quarter) and Progress grades ONLY. The rounding preference is a global setting that affects all of the classes assigned to you.
	Down – Rounds down Standard – rounds scores to the nearest whole number. Up – Rounds up. None – leaves the decimal in place for posting (DO NOT USE)
When courses are merged only show the merged courses	When checked, the Gradebook will not show individual course – sections that were combined to create a merged course. This will cause the merged course-sections to function as a single course-section.
Show Statistics in Gradebook	When checked, the Gradebook will display the following for each class at the bottom of the screen. Average/Mean: The sum of all assignment scores divided by the total number of assignments completed. Median: The median represents the middle of all values; half of the scores are above this number and half are below. If there is an even number of scores, the two middle scores are averaged and that number is the median. Mode: The most common or most frequent score. Std Dev: The mean (average) distance each score is from the assignment's mean (average). A small standard deviation number indicates more student's scores are closer to the mean (average). Min/Max: Lowest score. Highest score.
Show Student Picture on Hoer Student Name	When checked, hovering over the student name on the gradebook screen will allow the student's picture to display.
Confirm not taking attendance before leaving screen	When checked, it will ask you to confirm you want to leave the attendance screen without posting attendance.

• Assignment Filter & Assignment Defaults

The Assignment Filter defaults to Current Assignments (Current Grading Period) which is also the district recommendation.

Assignment Filter	
O All Assignments	
Current Assignments (Current Grading Period:)	
O Show all assignments for grading period:	w
O Show all assignments between the following due dates:	
Start Date:	
End Date:	

Assignment Defaults
Assignment Default Points Possible: 100
Select All Course Sections when Adding an Assignment:
Assignment Default Bonus Points Allowed:
Assignment Default Include in Grade Calculation: 🗸
Assignment Default Do Not Display in Parent Portal:
Display 'Term Final' in GP Selector: ✓

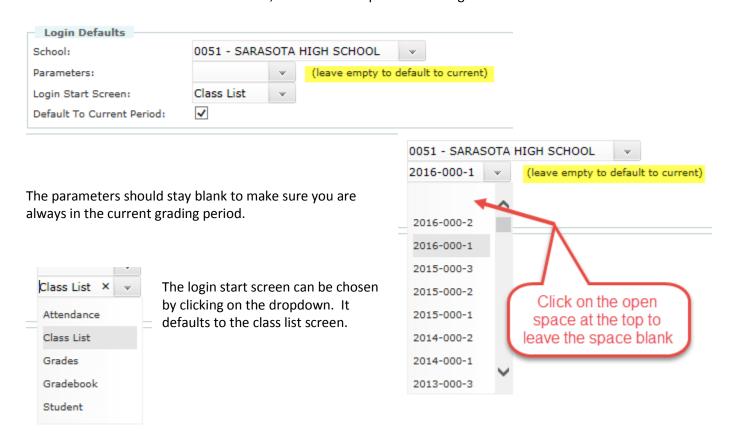
In the screenshot to the left are the defaults for the Assignment Defaults section. The two highlighted items should NOT be changed unless no assignments will calculate into the grade and no assignments should show in the portal for parents to view.

Assignment Filter	
All Assignments	Displays all assignments for all marking periods within the
	term (semester)
Current Assignments	Limits the assignments to the current marking period
	(quarter)
Show all assignments for grading period	Selects a specific marking period
Show all assignments between the following due dates	Limits the assignments displayed by due date range.

Assignment Defaults	
Assignment Default Points Possible	If majority of your assignments are the same number of
	points, entering the number here will default it in when
	an assignment is created.
Select All Course Sections when Adding as Assignment	When checked, the created assignment will be added to
	all of your classes.
Assignment Default Bonus Points Allowed	When checked, it will automatically check the bonus
	points allowed box on the add assignment screen.
Assignment Default Include in Grade Calculation	When checked, it will automatically check the box for
	include in grade calculation on the add assignment screen
	which will calculate the assignment grade that is entered
	for the student into the cumulative grade for the class.
Assignment Default Do Not Display in Parent Portal	When checked, it will NOT show the assignment and
	grade in the portal.
Display 'Term Final' in GP Selector	When checked, it displays the Term Final choice in the
	drop down under Term-GP on the assignment screen.

Login Defaults

The Login Defaults determine how your gradebook will open. The school will default to your current school. If you have access to more than one school, click on the dropdown to change the default school.

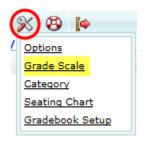


Login Defaults		
School	If a teacher instructs at more than one school, this allows for setting a default school	
	upon login.	
Parameters	Sets the default grading period upon logging in	
Login Start Screen	Sets the default screen that appears after logging in. Selections include Attendance,	
	Gradebook, & Grades.	
Default to Current Period	Works with Login Start Screen option above to have the class selected based on the time	
	of day the user is logging in.	

DON'T FORGET TO SAVE!



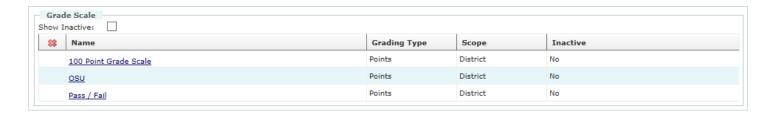
Grade Scale



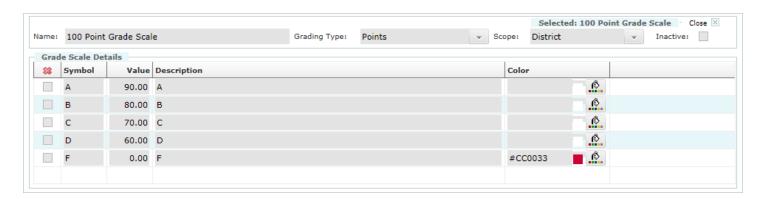
(NOT USED)

This is defaulted by the district. Currently there is no option to create or change the set up.

The Grade Scales list on the screen can be chosen by clicking on the underlined name of the grade scale.



When the grade scale is chosen ALL fields show in gray indicating that they cannot be changed.



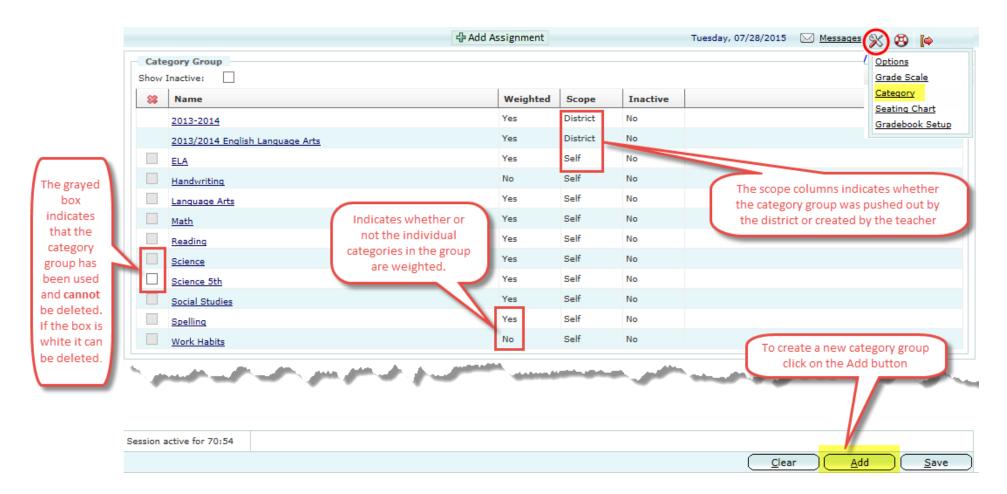
Category

• Create a Category Group

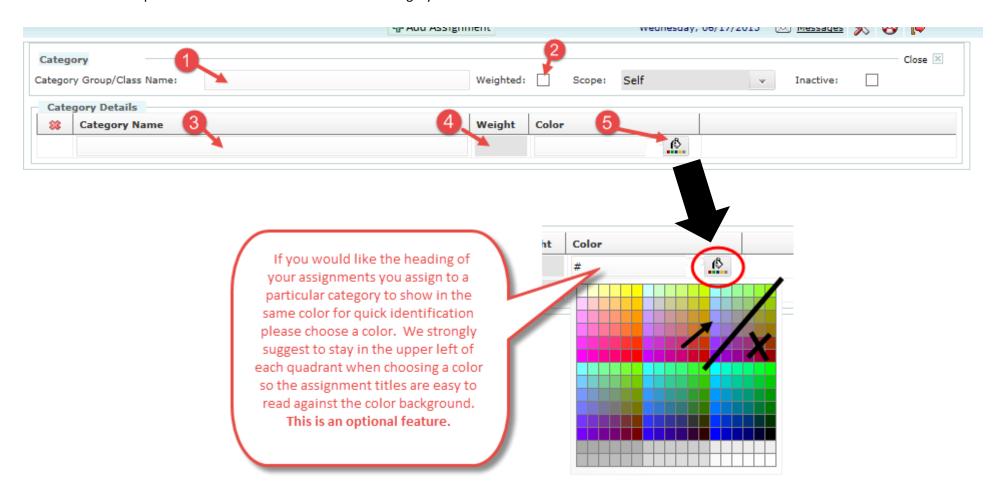
Categories are groups of like assignments. In the Gradebook, you may create as many categories as needed. Examples of categories are Homework, Quizzes, Dailies, etc.

Categories such as Homework, Quizzes, and Dailies are grouped together into a Category Group; this makes it easier to align a group of categories to a subject.

TIP: If all your classes have the same categories, with the same weight, only one "group" will need to be created.



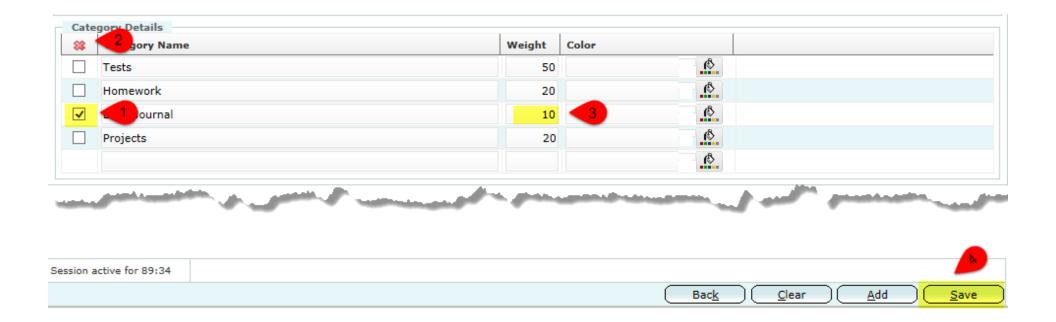
- 1. Enter the Category Group name i.e. Math
- 2. **IF** the Category Details (sub categories) will be weighted then check the box
- 3. Enter the name of the Category Detail i.e. Homework
- 4. IF the weighted box has been checked the Weight column will un-grey and the percentage can be entered. i.e. 40. Repeat step 4 until all your category details have been entered. **THIS IS OPTIONAL**
 - **If the weighted box is checked all weights must equal 100.
- 5. Click on the paint bucket and choose a color for the category. **THIS IS OPTIONAL**



Deleting Categories

If you need to delete a category, it may be removed as long as there are <u>no assignments with grades</u> in the category <u>AND marking period grades have not been posted</u>. The check box adjacent to the category title will be gray if assignment scores exist. Clear the scores from the assignments and then the category may be deleted.

- 1. Select the category to be deleted by clicking the check box adjacent to the category.
- 2. Click the Delete symbol 🗱 located at the top of the check box column. The category will be removed from the list.
- 3. Adjust the weight of the remaining categories so that they total to 100.
- 4. Click the **Save** button Save located at the bottom right corner of the page.



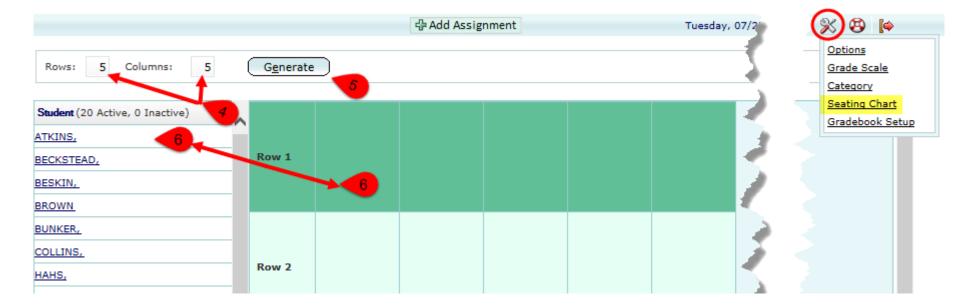
Seating Chart Setup (OPTIONAL Feature)

This is an OPTIONAL feature when setting up your Gradebook. It is helpful to set up and print for your sub plans folder. To set up your seating charts:

(Steps 2 & 3 can be done before step 1 with the same results before you start steps 4-6.)

- 1. On the Function bar, click Course Selector and select a class.
- 2. On the Information bar, click Settings icon.
- 3. From Dropdown, select Seating Chart.
- 4. Enter the numbers of Rows & Columns needed.

 (To create a chart where you have clusters of student desks add a row and column for the walkway between each set of desks.)
- 5. Click Generate to create your seating chart.
- 6. To add students to the seating chart:
 - a) Click the student's name in the student list column.
 - b) Click the cell where that student will be seated. It will place the student's picture (if uploaded) and name in the cell.
 - c) Repeat steps a) & b) until all students are placed in the seating chart.
 - d) Click **SAVE** save when finished.





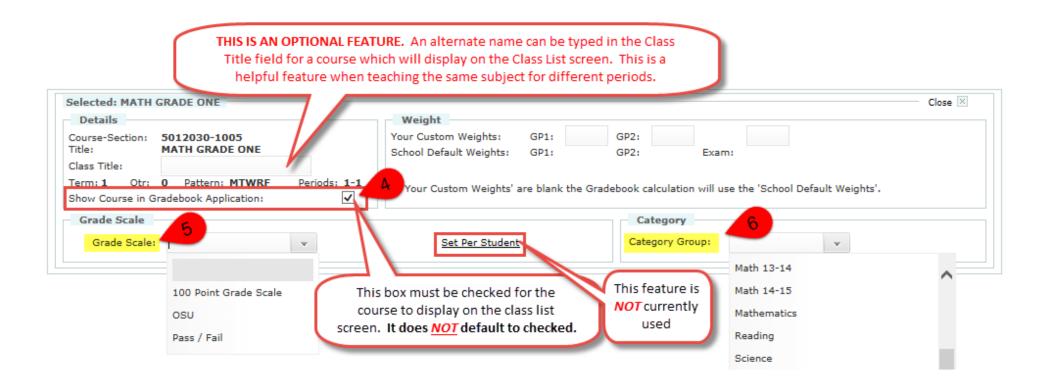
Gradebook Setup

The Gradebook setup page aligns a Grade Scale & Category Group to each class. Without this piece of the setup process assignments could not be created & added to classes.

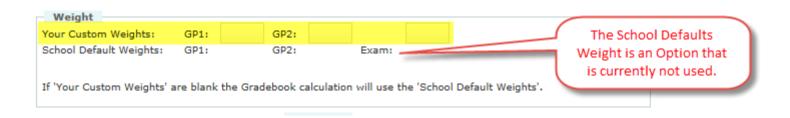
- 1. On the Information Bar, Click on the Settings icon.
- 2. From the dropdown menu, click Gradebook Setup. On the Gradebook Setup screen, each class assigned to the teacher will be listed.
- 3. Under the course-Section column, click on the underlined course-section number of the first class.



- 4. Click on the box 'Show Course in Gradebook Application' to check the box. (MUST be done for classes to display in Gradebook)
- 5. On the Gradebook Setup Detail screen, Click on the dropdown for Grade scale and choose the appropriate on for the class.
- 6. Click on the drondown for Category Group, choose the appropriate group.
- 7. Click the SAVE <u>Save</u> button at the bottom right of the screen.
- 8. Click the NEXT Next button at the bottom left of the screen to go to the next course –section. Follow steps 4 6 for ALL course-sections that will have assignments.



**The Weight feature is only used by classes with a Term Final (Semester Exam). Mainly high school and some middle school classes. This feature allows the semester grade of the class to be weighted by the teacher. The district default is 40/40/20 (40% of Q1 + 40% of Q2 + 20 % of Term final (semester exam) = Semester grade). If no percentage of the term final is to be counted please enter 50 in GP1 & GP2.



NOTE: Marking period grades can be setup to calculate several different ways. The chart below illustrates various grading scenarios that apply based on weight settings defined by the district. The percentages listed in the GP1, GP2, & Term Final columns are examples; you may enter your own percentage weights. Consult with your support staff/ team leader on how your school calculates grades.

	GP1	GP2	Term Final	Semester Final
			(Semester Exam)	
If each marking period is weighted and an exam is given	40	40	20	100
If each marking period is weighted and no exam is given	50	50		100
If the semester grade is a running total of the whole term. No marking period weighting and no exam is given. (Leave all fields blank)				100
If the semester grade is a running total of the whole	80% (implied, not			
term and an exam is given. In this example, the exam is 20% of the grade, which implies that the total for Q1	actually entered in the		20	100
and Q2 is 80% of the semester grade.	set	tup)		

• Merging Classes – (OPTIONAL feature)

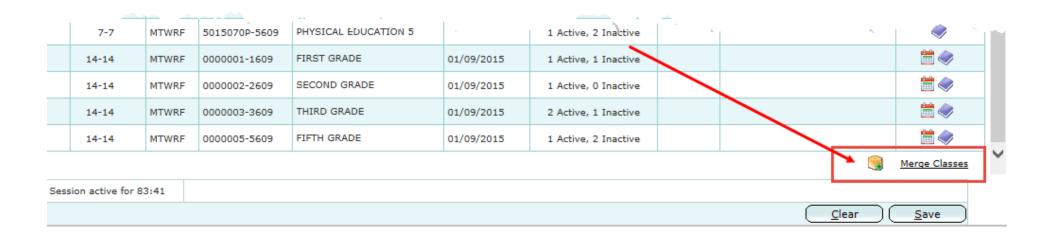
The Merge Classes feature allows for the consolidation of two or more classes to create one master class roster so you can streamline the process of taking attendance and entering grades.

You may want to use this procedure, for example, if you have been assigned to teach two or three classes during the same time period in the same room, such as Honors World History and non-Honors.

There are a few restrictions that are in place that prevent classes with dissimilar attributes from being merged together.

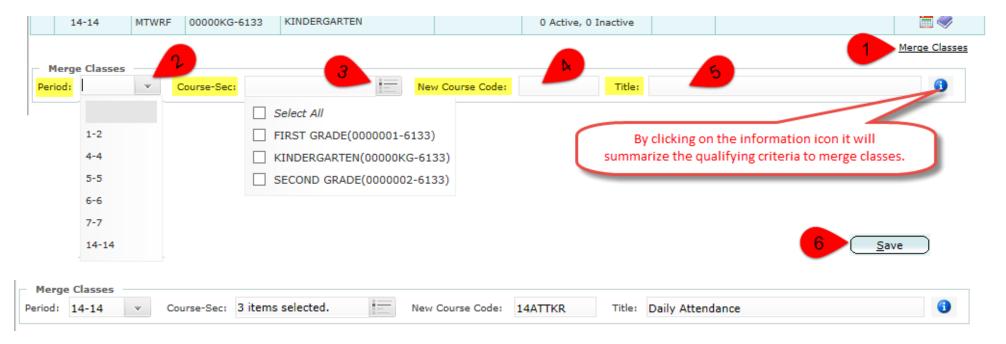
To merge multiple classes they must meet all of the following criteria:

- Belong to the same period.
- Have the same status. For example: Each class to be merged must be valid for attendance or grades. If one class is attendance only, and the other class is
 grades AND attendance, the classes do not meet the criteria. If both are valid for attendance OR both are grades and attendance, the classes can be
 merged.
- Meet for the same duration of time. In other words a class that is quarter long cannot be merged with a class that is a semester or year long.
- If you plan to use the merged classes for Gradebook, not just attendance, the classes must have the same Category Group so that all assignments are weighted using the same method and the system will be able to calculate grades.
- If you plan to use the merged classes for Gradebook, the classes must have the same Grade Scale. For example, you cannot merge a class that uses letter grades with a class that uses points.
- Not have had any prior activity recorded against the class. For example, if you have entered attendance or grades for a class, you cannot merge it with another. If assignments have already been created for the classes, the classes cannot be merged.



If the classes meet the preceding criteria, they can be merged using the following process:

- 1. On the Class List screen, click on the Merge Classes Link located at the bottom right of the Class List page.
- 2. From the Merge Classes Menu select the class period to be merged by clicking on the Period drop down selector. Only periods that qualify will be listed.
- 3. Once the period is selected, the Course-Sec drop down will list all classes for the selected period that can be merged together. Select the check boxes for all classes to be merged.
- 4. Fill in a new course code. This is used to define the new class to the system. You can make up your own code, but is has to be unique. A good way to ensure uniqueness is to use the Period, Subject, and your initials. For example: period 2 math for John Doe would be P2MATHJD.
- 5. Add a class Title. This can also be indicative of the period or subject.
- 6. Click **Save** when done. Repeat for each class to be merged.



You can click the plus sign (+) that appears to the left of the Period field to expand the merged class to see the original classes. In addition, when you display attendance and grades for the merged class, you can identify the original classes each student was assigned to by "hovering" the mouse over each student's name.

• Un-merging Classes

NOTE: Un-merging classes <u>AFTER</u> assignment grades have been entered is <u>NOT RECOMMENDED!!!</u> The unmerge feature is intended for use before assignment grades have been entered.

If classes have been merged accidentally, you can "undo" the merging.

- 1. Delete all assignments in the merged class.
- 2. Select the class to be un-merged by clicking the check box adjacent to the class.
- 3. Use the Delete icon on the Class List screen adjacent to the class to be un-merged.
- 4. Click **Save** (Save when finished.

88	Prd	Pattern	Course-Sec	Title	Attendance	Seat Count	Q2 Avg	Add/Drop	Action
1	1-2	MTWRF	5010041-6933	LANG ARTS K		0 Active, 0 Inactive	-	-	◇ № Ⅱ
	7-7	MTWRF	5015040P-6233	PHYSICAL EDUCATION 2		0 Active, 1 Inactive			>
	14-14 +		14ATTKR	Daily Attendance	01/09/2015	7 Active, 1 Inactive			⊞ ◆

Assignments

Add Assignments

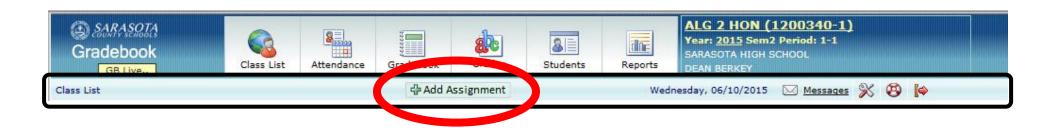


If you intend to merge classes together, you must do so <u>BEFORE</u> creating assignments or taking attendance, Reference section *Gradebook Setup*, *Merging Classes*.



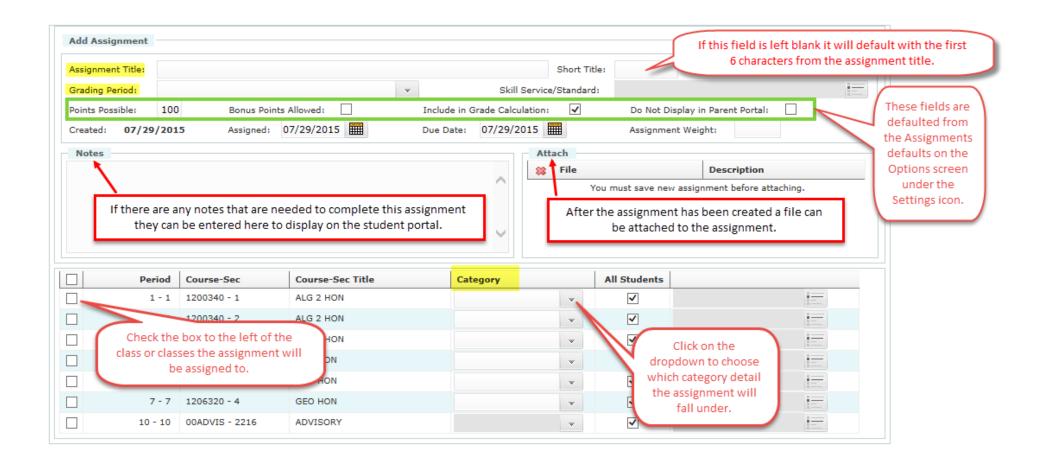
Creating Assignments

1. On the Information Bar, click Add Assignment button.



NOTE: An assignment can also be added by clicking on the Gradebook icon, choosing Assignments from the dropdown and clicking on the Add button at the bottom right of the screen.

2. Enter the assignment details as illustrated in the following screenshot. The highlighted fields are REQUIRED to be entered.



3. Click **Save** when finished. You have now completed the initial setup of your Gradebook and can begin entering assignment grades. Reference section *Entering Grades* for more details.

Add Assignment Field Explanations				
(* Indicates a required field)				
*Assignment Title	Enter an appropriate title for this assignment. You may enter up to 40 characters.			
Short Title	Enter a 6-charcter short version of the title. This displays in the column header of the			
	assignment in the Gradebook. If left blank, the first 6 characters of the long title (assignment			
	title) are use.			
*Grading Period	Click the dropdown box to select the grading period the assignment will be created for. Thi			
	will default to the current grading period unless otherwise chosen.			
Skill Service/Standard	This feature is currently NOT USED.			
Points Possible	Enter the maximum number of grade points a student can earn on this assignment. A default			
	preference can be set for this under Settings>Options>Assignments Default > Points Possible			
Bonus Points Allowed	Click the check box if scores over the Points Possible value are going to be allowed for this			
	assignment.			
	For example: If an assignment is worth 100 points, you may not enter a grade over 100			
	unless Bonus Points Allowed is checked.			
	If you would like the assignment to be EXTRA CREDIT, check the Bonus Points Allowed and			
	Set the Points Possible field to 0.			
Include in Grade	Click the check box if this grade will be included in the grade calculation; essentially makes the			
Calculation	assignment active or inactive. Either way, grades can be entered.			
Do not Display in	Click the check box if you do not want this assignment included in the report on the Parent			
Parent Portal	Portal.			
Created	This is the date the assignment was created; it will display today's date.			
Assigned	Select the date the assignment will be assigned.			
*Due Date	Select the date the assignment will be due. Defaults to current date.			
Assignment Weight	You may weigh the assignments even if category weighting is used.			
	Assignments receive a weighting of 1 by default when created. You do not have to enter a			
	weight in the weight field unless the assignment weight is something other than 1.			
	Assignment weights are multipliers , not percentages. In other words setting the weight to			
	2 will multiply the points possible and the points earned by 2.			
	For example, a student earns a grade of 80 on a 100-point assignment. If the assignment			
	weight is 2, the points possible will be 200 and points earned will be 160.			
	You can enter a value for the assignment weight only if the Grading Type defined in the			
	Grade Scale settings is points. If you want to reduce the impact the assignment has, you can enter a value less than 1,			
	such as .5			
Notes	Type comments about this assignment to appear on the Parent Portal.			
Attach	Click the Select field to find and attach a file to attach to this assignment.			
Attach	Note: You must first Save the assignment before you can attach a file.			
Period	The system displays the class periods in this column. Only the selected class period is checked			
i chou	by default.			
	If you prefer not to assign this assignment to classes, click the check box that appears to the			
	left of the Period column to unselect all. Then, click the check box that appears to the left of			
	each class the assignment will be added to.			
Course-Sec	Lists the course and section number of the class			
Course-Sec title	Lists the course title as listed on the class list screen			
*Category	Click the drop-down box to select the category, such as homework or quiz, the assignment			
	will be related to.			
All Students	This check box is checked by default to indicate all students are to complete this assignment.			
	To specify only certain students who the assignment will apply, unselect the check box and			
	then select the individual students by clicking the check box next to each student's name.			

Creating Extra Credit Assignments

Any scores entered into an assignment defined as extra credit will contribute to the category total points earned but not to the category total points possible.

The Gradebook uses the following formula to calculate a category grade when extra credit assignments are in use.

Category grade = [(Sum of (Assignment Score * Weight) + (Extra Credit Points Earned)) / Sum of (Assignment Points * Weight)]

Notice that the extra credit assignment does not add to the points possible for the category and is not counted in the average. Only regular assignments will add to the points possible and are used as a divisor for the average.

- 1. On the Information Bar, click the **Add Assignment** button.
- 2. Enter the assignment details as follows.
 - a) Add a title for the extra credit making sure it indicates as such and add Short Title.
 - b) Grading period will default to the current grading period. If creating assignment for future quarters please make the change accordingly.
 - c) Make sure that **zero** is entered for Points Possible.
 - d) Bonus Points Allowed box <u>MUST</u> be checked. (This with the zero points possible makes the extra credit assignment)
 - e) Assigned/Due Date defaults.
 - f) Check box for the class/classes the extra credit will be assigned to and choose the category the extra credit will count toward.
- 3. Click SAVE. The Extra Credit will now display in the Gradebook.

Creating an Exam Assignment

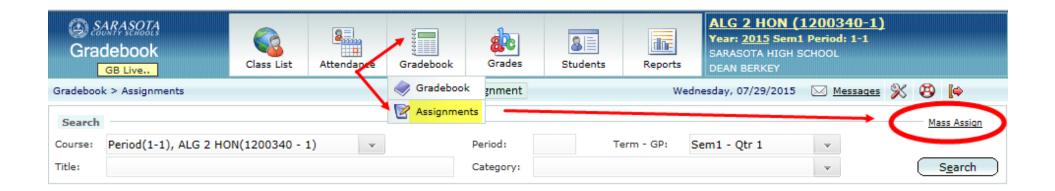
- 1. On the Information Bar, click the Add Assignment button
- 2. Enter the assignment details as follows.
 - a) Add a title such as Exam 1 and a Short Title if desired
 - b) And, MOST IMPORTANTLY, what separates a regular assignment from an exam is the GRADING PERIOD field. Click on the Grading Period field and select the **0 Term Final** option. See screen shot below.
 - c) Enter Points Possible
 - d) Keep "Include in Grade Calculation" checked
 - e) Edit the Due Date
 - f) Check the box for the class/classes the exam will be assigned to and choose the category the exam will count toward.
- 3. Click **SAVE**. The Exam will now display in the Gradebook

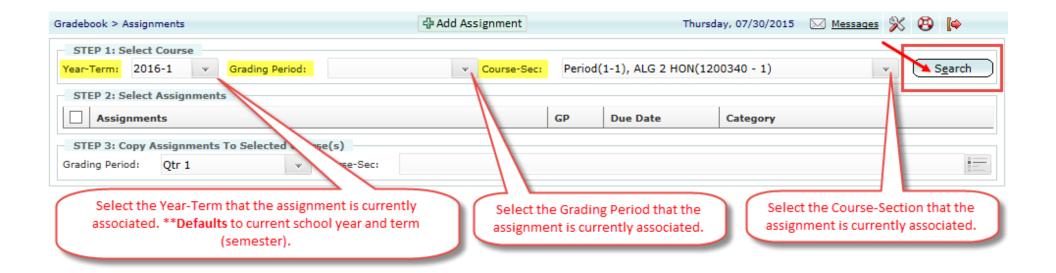
Mass Assign

Once assignments have been created for a course, the Mass Assign option allows you to copy assignments to other classes.

This feature is very handy when you have been given a new section of a course that you are already teaching and need to copy over assignments that have already been created.

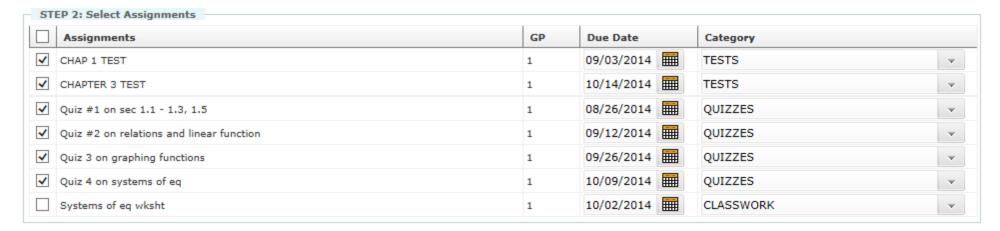
- 1. In the **Function Bar** click on the name in the **Gradebook** icon.
- 2. Choose **Assignments** from the dropdown.
- 3. Click on Mass Assign.





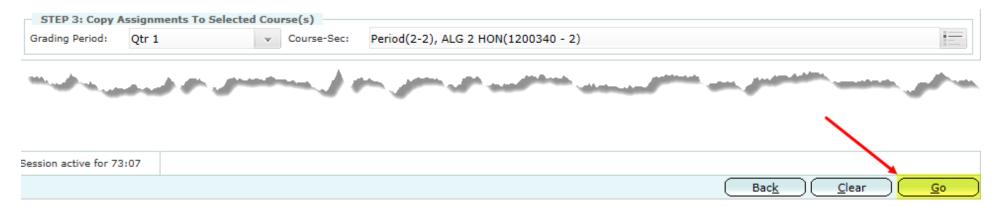
STEP 1: Select Course

- 1. Click on the dropdown for Year-Term to choose the year and term (semester) that the assignment is **currently** associated.
 - **Defaults to the current school year and Term (semester)**
- 2. Click on the dropdown for **Grading Period** and choose the grading period that the assignment is **currently** associated.
- 3. Click on the dropdown for **Course-Sec** and choose the course-section that the assignment is **currently** associated.
- 4. Select source course assignments to display a list of course-sections click the **Search** button. The system displays a list of assignments in the Step 2 section.



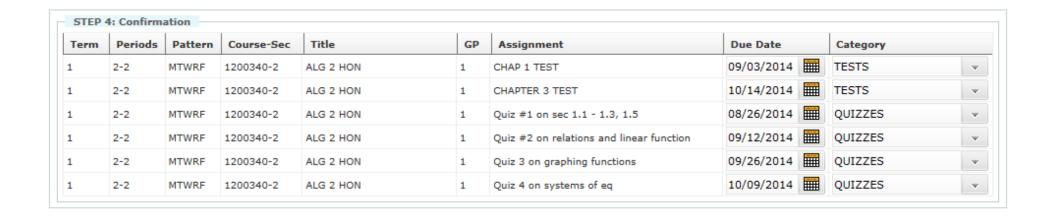
STEP 2 : Select Assignments

- 1. Select **Assignments** by clicking the check box that appears to the left of each assignment you need to assign. To include all the assignments, click the check box that appears to the left of the **Assignments** field name.
- 2. Change due date of the chosen assignment(s) if needed. If the assignment(s) have been chosen from prior years the due date <u>MUST</u> be changed.
- 3. Change **Category** for chosen assignment(s) if needed.



STEP 3 : Copy Assignments to Selected Course(s)

- 1. Choose the **Grading Period** where the selected course(s) will be mass assigned.
- 2. Choose the **Course-section**(s) where the selected course(s) will be mass assigned.
- 3. Click the **Go** button at the bottom right of the screen. The system displays the STEP 4: Confirmation screen.



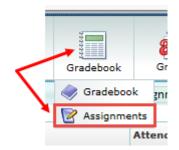


STEP 4: Confirmation

- 1. Confirm that the assignments shown are to be added to the selected courses. You can choose to change the due date and category.
- 2. Click the **Save** button to mass assign these assignments.

NOTE: If the receiving course has a different category set than the source course, you will be <u>required</u> to enter a category for each assignment.

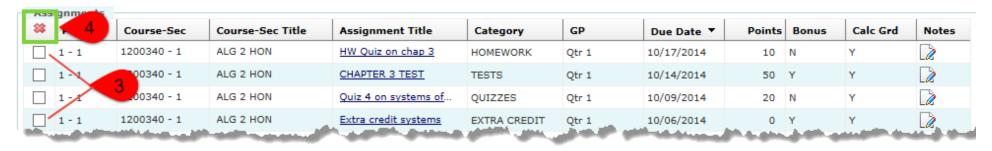
Deleting Assignments

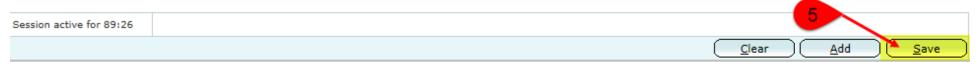


- Open the Assignment Manager by clicking on the function bar icon Gradebook, and then Assignments.
- 2. Locate the assignment to be deleted by using the **Search** feature.



- 3. Select the assignment to be deleted by clicking the check box to the left of the assignment. A gray check box means there are scores for the assignment in the Gradebook and the scores must be cleared first.
 - ** If box is grayed Clear the scores for the selected assignment in the Gradebook then proceed with step 3.
- 4. Click the delete symbol located at the top of the check box column. The assignment will be removed from the list.
- 5. Click the **Save** button located at the bottom right corner of the page.

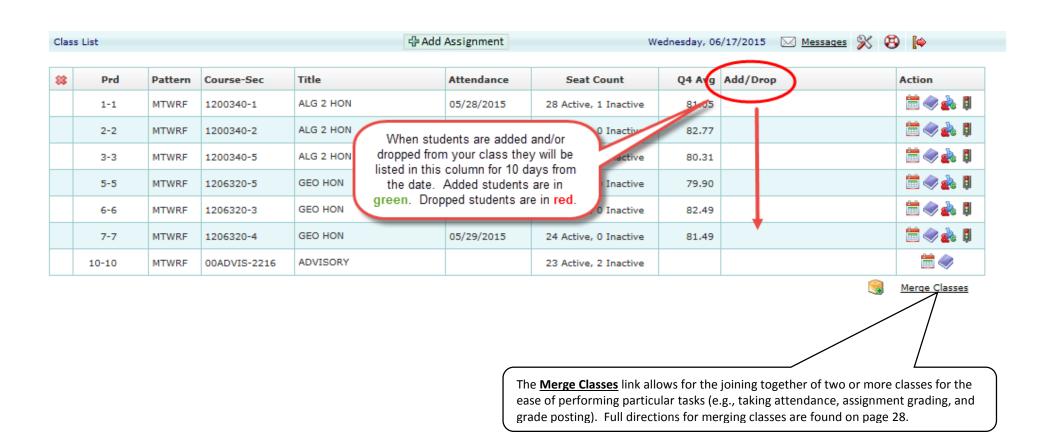




CLASS LIST - (Default screen)

Add/Drop feature

Found on the Class List screen it's an indicator for movement in a particular class.



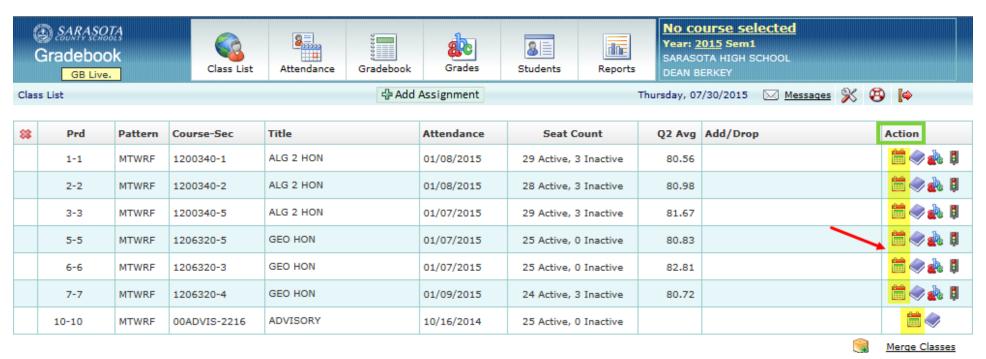
Attendance

There are two ways to get to the attendance screen. Please choose one of the following:

1. On the **Function Bar**, use the **Course Selector** to select the class for which attendance will be taken, and click the **Attendance** icon.



2. From the Class List, click on the Attendance icon in the Action column for the class which attendance will be taken.



Daily Attendance

Posting By Seating Chart

To take attendance by your seating chart click on the Views icon and choose By Seating Chart.

ALL Are Accounted

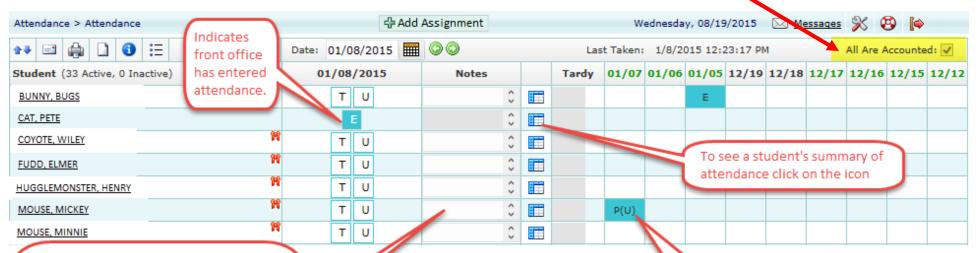
If ALL students are present check the All Are Accounted box at the top left then click SAVE.

**ONLY available on initial attendance post. If attendance is already posted and a change is made to a student's attendance indicating now that all students are present the box will be grayed out. Just click SAVE.

Daily

To mark attendance for an individual student you must do one of the following:

- 1) To mark a student Tardy click the box with a T
- 2) To mark a student absent click the box with a **U**
- 3) If the student is present do **NOT** mark anything.
- 4) Click SAVE.



Attendance NOTES Feature:

Attendance not4es can be entered in this field for the inidividual student. It is only viewable on this screen and cannot be searched for under the Notes icon.

Indicates teacher initially took attendance and the front office changed it at a later time.

1st code is front office entered code.

Student (29 Active, 0 Ina

ADOLE

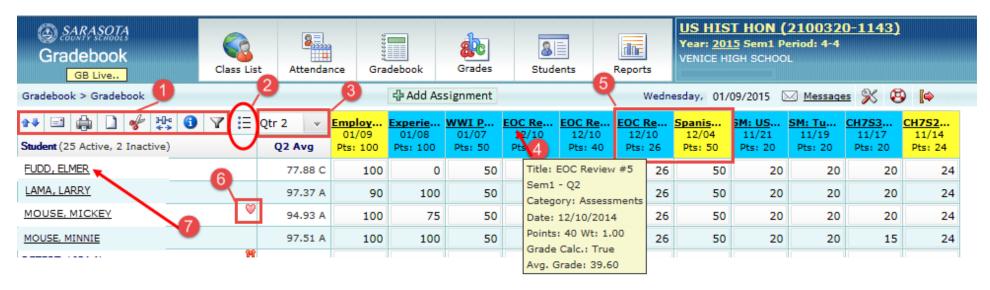
By Seating Chart By Month

2nd code in parenthesis is teacher entered code.

Gradebook

Features

The Gradebook screen located under the Gradebook icon on the Function Bar has a plethora of features to make easier on a teacher. The following pages describe in detail what each feature will do.



Action Bar

There are several different features on the action bar:

Sort

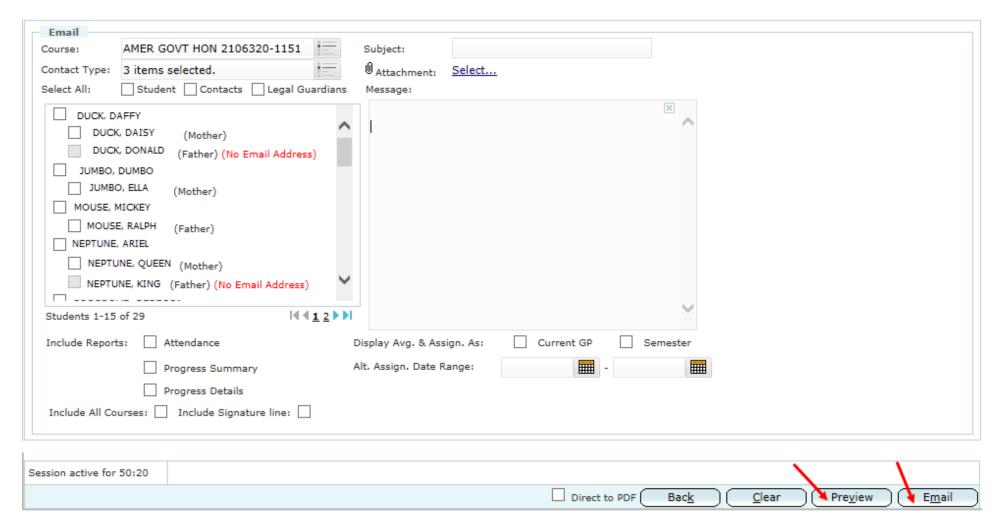
The Sort Options icon give you a choice of how to sort your list of students. It will only stay in the sort chosen while you are on the screen. If you move to another screen it will default back to straight alpha.

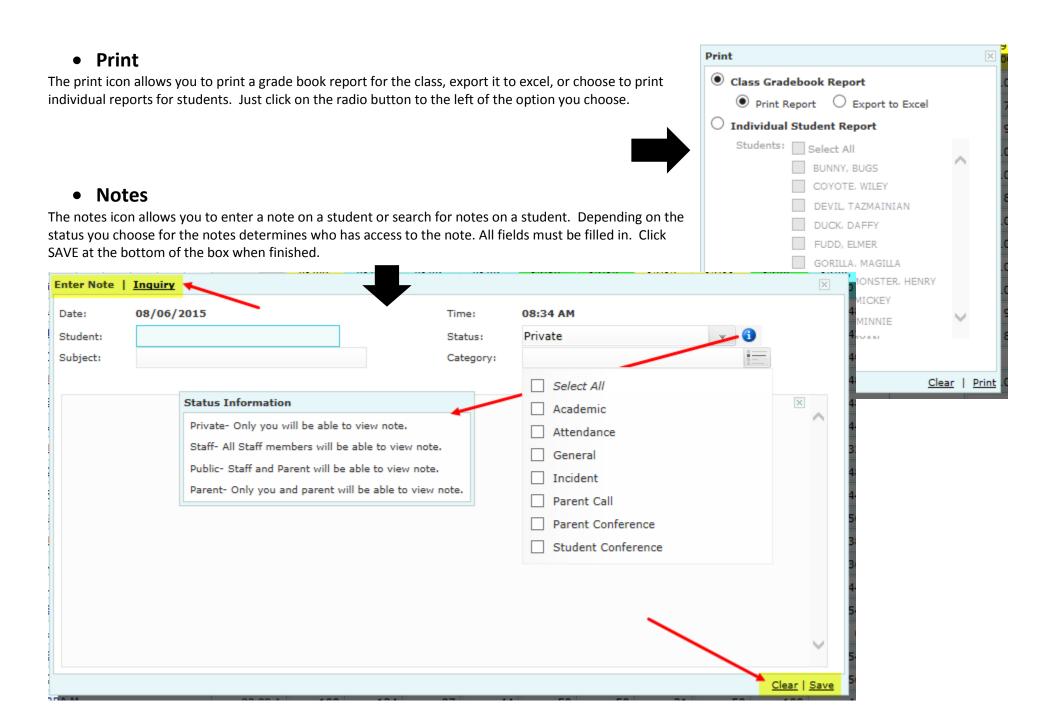
- o Arrow up means Ascending order (A-Z)
- o Arrow down means Descending order (Z-A)
- Clicking on the My Sort icon will allow you to set up a personal sort for your class. Click on the Hand to the left of the student's name and drag it to the where you want the student in the list. Click Apply when done.



Email

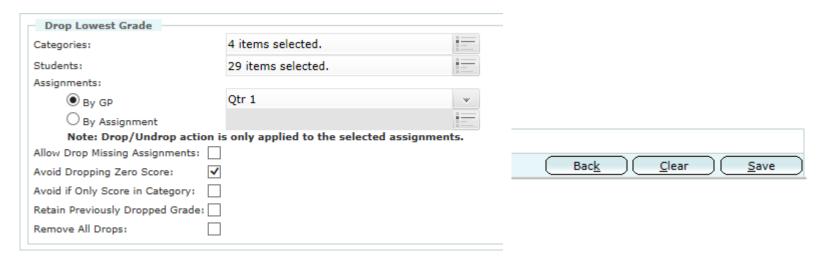
The Email icon allows you to email several different contact types depending on the information being sent out. Files, PDFs, documents, and Jpegs can be attached to the email along with the typed message within the email. Can also include attendance information, progress summary or details by a certain date range. Once the email is all set up it can be previewed before emailing.





Drop Feature

The Drop Lowest Grade icon allows you to set up criteria to automatically drop the lowest grade for a student per a quarter. This feature can be used at any time during the quarter BEFORE grade posting at the end of the quarter. The drops can be removed also. Be sure to SAVE when finished.



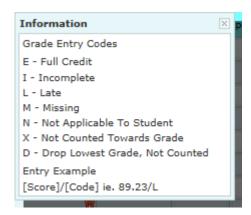
Wide View

The wide View icon expands the column to lengthen the header clicking on it again shifts it back to the original view. The arrows at the bottom of the icon indicate which way the columns will move when the icon is clicked on.



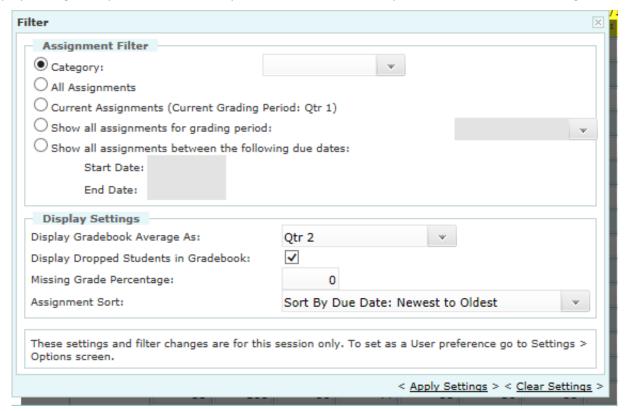
• Information Icon

The information icon gives a brief explanation of the Grade entry codes that can be used to calculate the student's grade.



• Filter

The filter icon allows you to view specific categories, assignments types, date ranges, and display settings for the current session only. If you would like to permanently change the display settings that you have chosen they need to be done on the Options screen under the Settings icon.



Views

The view icon gives 4 different views of the Gradebook with 2 allowing grade entry and notes.

By Student

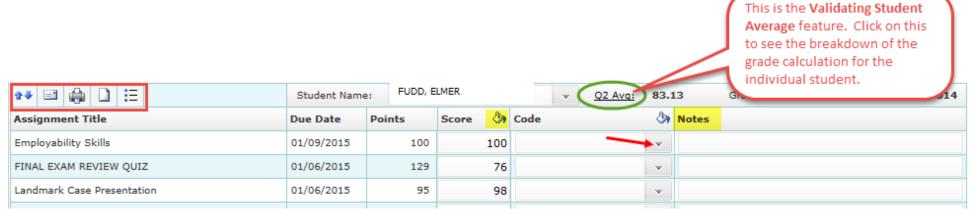
This view allows grade entry on the individual student for all assignments with in the quarter.

- Several features from the Action Bar are available on this screen.
- Choose a student from the dropdown for the screen to fill in.
- o Assignment scores can be auto-filled by using the paint bucket feature.
- Grade Entry Codes can be entered for an individual assignment or the paint bucket can be used to auto fill.
- Notes can be added for an individual assignment.
- o Validating Student Average feature is a great way to view the calculation of a student's current grade average if it is in question.

By Student

GP View

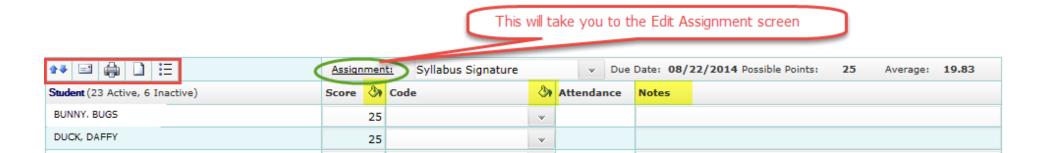
By Assignment Category View



By Assignment

This view allows you to view all grades for a specific assignment.

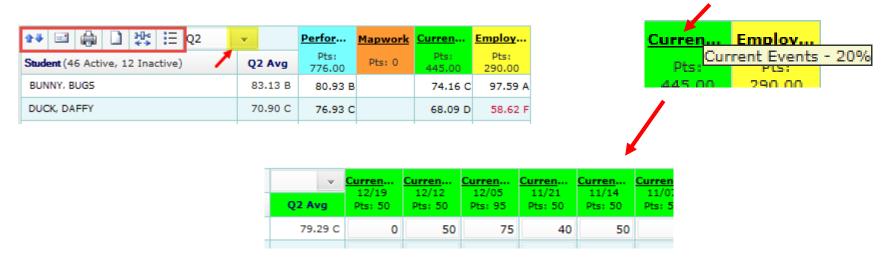
- Several features from the Action Bar are available on this screen.
- o Choose an assignment from the dropdown for the screen to fill in.
- o Clicking on the underlined Assignment title will allow you to edit the assignment information.
- Assignment scores can be auto-filled by using the paint bucket feature.
- o Grade Entry Codes can be entered for an individual student or the paint bucket can be used to auto fill.
- o If attendance has been marked for the student it will be indicated in the attendance column.
- Notes can be added for an individual assignment.



Category View

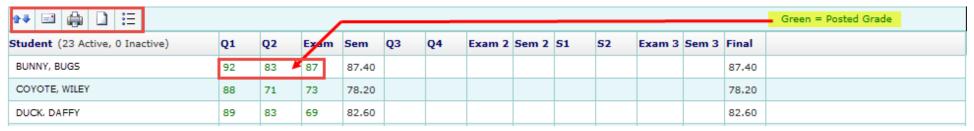
This allows you to see the grade average for each category for individual students.

- Several features from the Action Bar are available on this screen.
- The grading period can be changed by choosing from the drop down.
- o Hovering over the underlined header will show the category title and weight.
- Olicking on the underlined header will display all the assignments for that particular category. It will then allow you to change individual student grades for any assignment in that category.



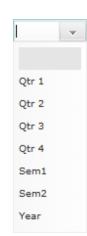
GP View

This allows you to see the current quarter, exam, semester, and final grades in real time. Once the grade has posted it will turn green indicating as such. The current percentage grade showing is pulled from the Gradebook grade avg column.



View Different Quarter

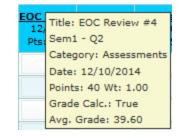
To view a different quarter within the semester or the semester grade average click on the drop down and choose one of the grading periods.

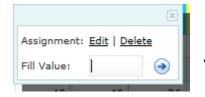


Assignment Header:

Hovering the cursor over the underlined assignment title shows the details of the assignment when it was created.





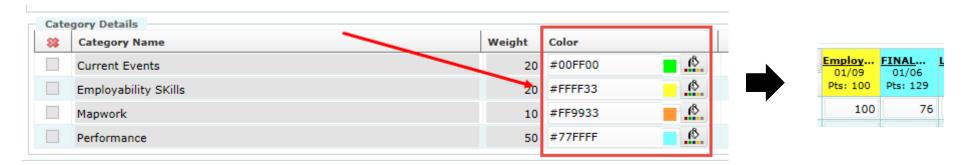


Clicking on the underlined assignment title will allow you to edit, delete, or auto-fill the column with the same grade.

- To edit the assignment click on the underlined Edit which will take you to the assignment screen. Make the changes and click SAVE.
- To delete the assignment: 1) Clear out any grades that have been entered. 2)
 Click the underlined Delete
- To use the Fill Value feature enter the grade in the box and click the blue arrow to the right of the box.

Category Colors

When setting up your categories, if you choose a color for each category detail this is where that feature shows.



Student Indicators

Student indicators show to the right of the student name. student's information for that particular indicator. Students can



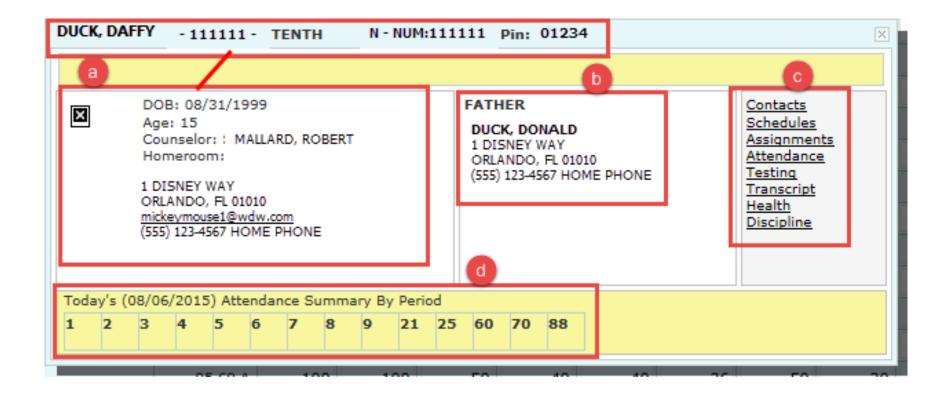
Hovering over the indicator icon will show the more than one indicator.

8	Do not release to: Clark Kent (Friend)	Do Not Release	Indicates that the student cannot be picked up by the person listed because they were marked NO for pickup on the registration form
Ħ	Special service: X - EXCEPTIONAL STUDENT SERVICES	Special Service	Indicates the student is ESE/ESOL/ 504
	Special service: 504		
0	Dropped: 08/21/2014	Dropped	Indicates the student was dropped from the class with grade posted
0	Health condition: ALLERGY TO INSECT BITES HIGH RISK (LT)	Health Condition	Indicates a Health issue
<u>^</u>	Please sent Mickey to Dr. Mallard's office	Alert	A temporary indicator created by the front office usually requesting the student be sent to someone.

Name Hover

Clicking on the underlined student's name will take open up a pop-up with a quick view of the student's information. It will list the following:

- a) Student's information
- b) Registering parent (first parent)
- c) Links to ALL student information
- d) Today's attendance by period.



Grades

Posting

Assignment Grades

There are two options to get to the Gradebook screen for entering assignment grades:

- o On the **Function bar** click on the Gradebook icon and choose Gradebook from the dropdown.
- o On the Class List screen click on the Gradebook icon under the Action column for the class you wish to enter assignment grades for.

• Entering per Student

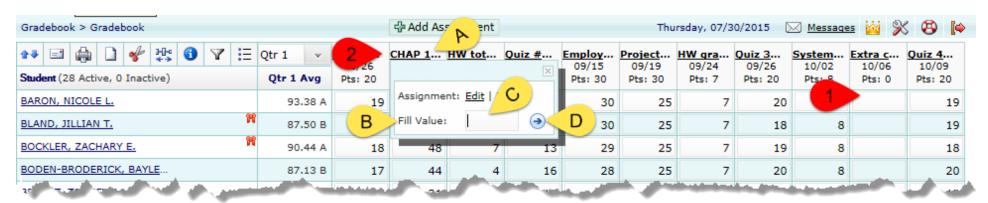
On the Gradebook screen click on the cell for the specific student under the particular assignment and enter the grade. Repeat this down the column to fill in the assignment grade for each student.

Mass Assign

Click enter or the down arrow to move to the next cell down. The down arrow can also be used to move to the next cell down.

- 1. To auto fill the same grade for a particular assignment for the whole class:
 - a) Click on the underlined assignment title in the header.
 - b) Move the cursor, place it in the **Fill Value** box.
 - c) Type in the value
 - d) Click on the blue arrow to auto fill the grade down the column.
- 2. Click SAVE when done.

**Anytime a grade is already entered but needs to be changed just click on the cell, highlight the grade and type over it, then click SAVE.



• Assignment Grade Codes

There are several Grade Codes defined in the system that can be used to denote reason for a grade entry, e.g. "M" for missing instead of entering a zero. A legend of the available Grade Codes with a brief description can be found by clicking on the symbol on the Action Toolbar. Below is a full explanation of each codes and how it will look in the portal if the code is used.

Entry Example: (Score) / (Code) i.e. 89/L

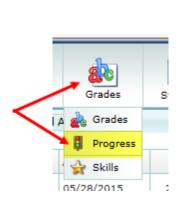
/E	Full Credit	Enters the assignments full points possible into the calculation, even if a numeric value is entered.		
/I	Incomplete	Flags the assignment or grade as incomplete. Does not enter a numeric value into the calculation UNLESS a numeric value is entered before the /.		
/L	Late	Flags an assignment as Late. Does not enter a numeric value into the calculation UNLESS a numeric value is entered before the /.		
/M	Missing	Calculates a numeric value based on the teachers preferences set under Settings Options. If no preference is set, a zero is calculated.		
/x	Not Counted Towards Grade	Removes the assignment from entering into calculation. Basically an exempt. Assignment will still be viewable on the Portal		
/N	Not Applicable To Student	Removes the assignment from entering into calculation AND from displaying on the Parent\Student Portal. This can be automatically populated when setting up the assignment and configuring the All Students option.		
/D	Drop Lowest Grade, Not Counted	Removes the assignment from the grade calculation. Can be auto populated by using the Drop Grades feature.		

Progress (Mid-Term) Report Grades

Middle & High Progress Grade Posting

To post (or submit) grades at the end of a progress report period:

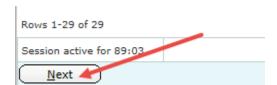
- 1. On the Function Bar, click Grades.
- 2. From the dropdown menu, select Progress or use the Progress Action icon on the Class List screen.





1. On the **Progress** screen, enter the appropriate information, as illustrated in the following screen capture:

To select another class to enter progress grades, use the Class Selector located at the top right of the GradeBook.

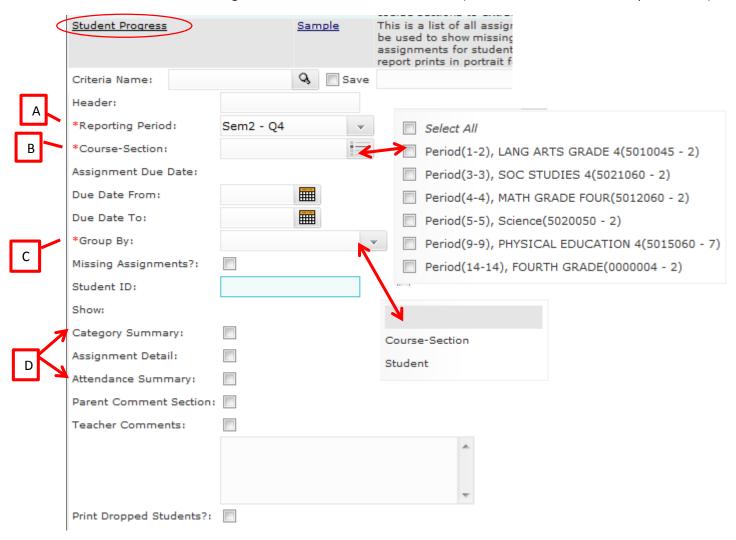


• Elementary - Student Progress Report

1. Click on the Report tab at the top right of the screen.



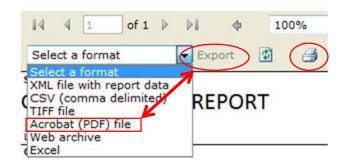
2. Scroll down to Student Progress and click on the underlined title. (The red asterisks indicate required fields)



- A. The Reporting Period will default to the current quarter. If you would like to change it click on the drop down
- B. Select the courses you want the progress report to run for from the dropdown. (Usually you would select all classes except period 9 & 14)
- C. Always choose Student for the Group By. That will allow all the classes for that student to print on one page.
- D. Check the box for Category Summary & Attendance Summary so the current average grade & the student's attendance will print on the progress report. (You can choose Assignment detail but that will cause the report to be multiple pages for one student.)
- 3. Click Preview (at the bottom left of the screen) to run the progress reports.



4. Once the report finishes you can print or save to your desktop by choosing Acrobat (PDF) file from the dropdown & clicking Export.



Viewing past Progress (Mid-Term) posts To view past Progress submittals use the Date Selector on the Progress page. Click on the date and select the progress period date that is appropriate.

End of Quarter Grade Posting

Directions for posting end of quarter grades are located at the end of the manual broken down by quarter then school level.

Students

Accessing Student Information

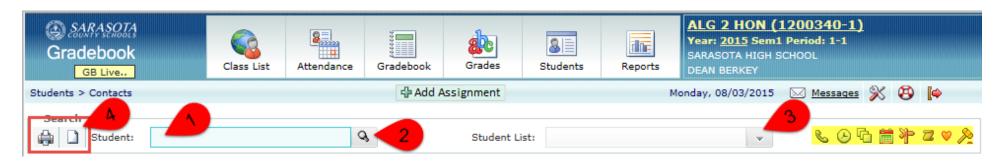
Student information can be accessed from the **Students** icon on the **Function Bar** for any student scheduled in one of your classes during the school year. The following screen capture lists the type of information available from the dropdown menu.

To access information for a particular student (e.g., a student's contacts):

- 1. On the Function Bar, click Students.
- 2. From the dropdown menu, select one of the information types.
- 3. On the screen, search for the student.

There are 3 options to pull up a student on these screens:

- 1. Start typing the student's last name in the **Student** field
- 2. Click on the magnifying glass to do an Advanced Search if you can't type in the student's name
- 3. Click the drop down and choose the student name from the Student List field. The student that will show on the list are the ones assigned to the class list in the Course Selector at the top right of the screen.
- 4. ALL screens under the Student tab have the Print and Notes features.

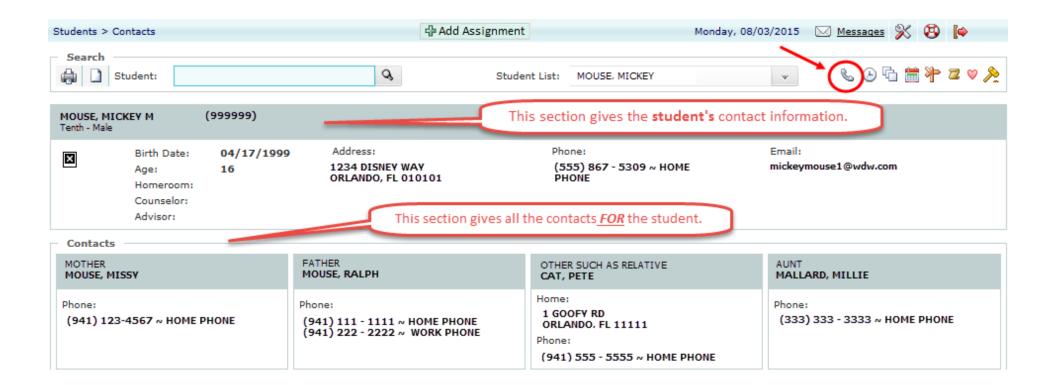


^{**} You will notice that the icons for the type of information available is also listed to the right of the search box.

^{**} At any time the icons on the Search section can be used to move to a different tab by clicking on the section icon.

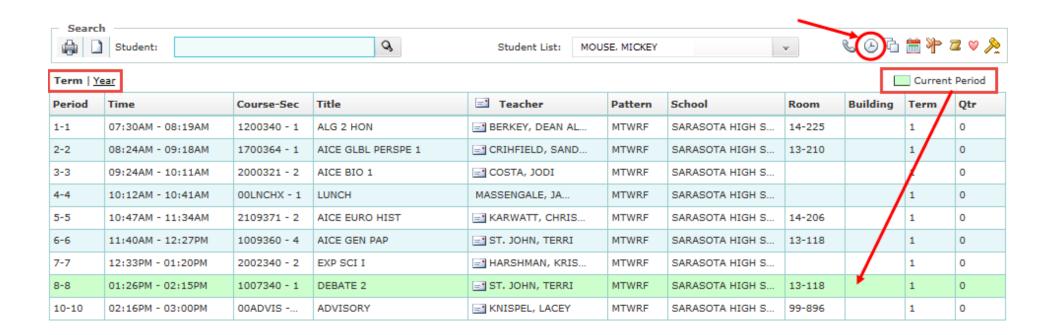
Contacts

The contact screen has three sections; Search, Student, & Contacts. The Student section gives the student's **Contact** information. The contact section directly below lists each contact for the student and all of their phone numbers entered in the system along with the type of contact.



Schedules

On the Student Schedules Screen the student's schedule can be view for the Term/Year. The one bolded is the current view. The line highlighted in green indicates the current class the student is in.



Assignments

The Student Assignments screen allows several different views of assignment information. The list below will help filter the assignments:

- 1. The **Scope** field allows you to search between school & district for assignments. This is helpful if a student takes classes at multiple schools.
- 2. **GP** field allows you to search in a particular quarter for the assignments.
- 3. Toggling between the options will change the view of this screen's assignment information. The current view is indicated by the items in bold.
- 4. When the box(es) are checked, the screen will only display those assignments.
- 5. Clicking on the plus sign will allow you to drill down to each assignment & its grade.
- 6. Clicking on the letter icon will allow you to email all teachers or an individual teacher.

Missing Assignment Feature

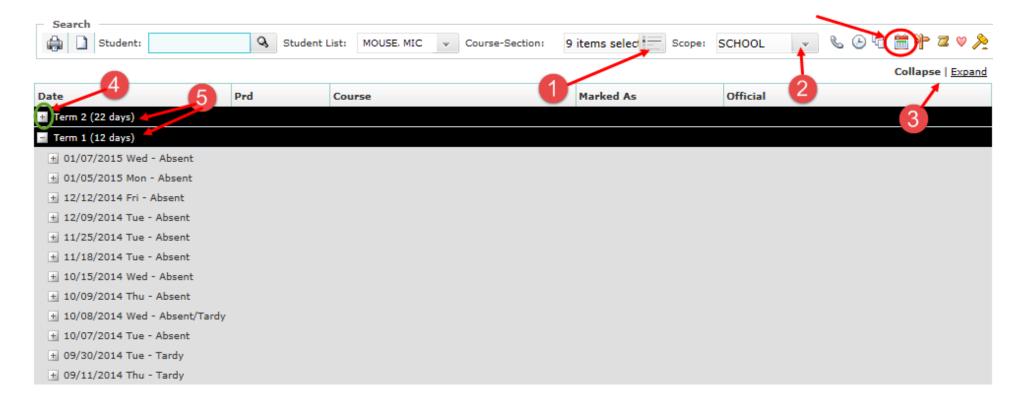
If a student has a *missing assignment* it is indicated in the **MA** column with a red exclamation mark.



Attendance

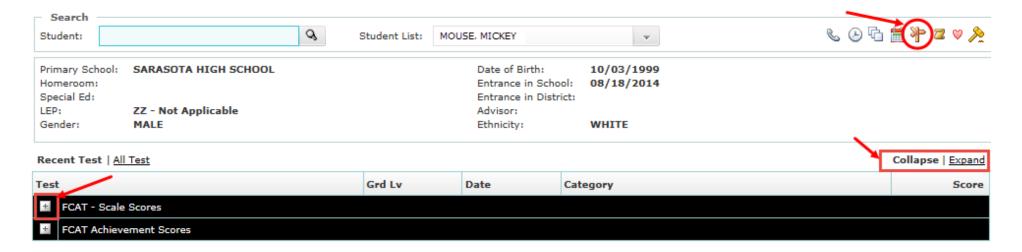
The Student Attendance 🛅 screen gives several options for attendance to be viewed for the entire year.

- 1. **Course –Section** One or more courses can be chosen from the dropdown to view specific attendance.
- 2. **Scope** Can choose between school & district
- 3. The attendance screen defaults to **Collapse** for the sake of space. By clicking on **Expand** it open both Terms & every date listed to show attendance for all classes that are marked to take attendance.
- 4. Clicking on the plus sign will expand the item.
- 5. The number of days a student has had attendance marked is listed as a quick summary.



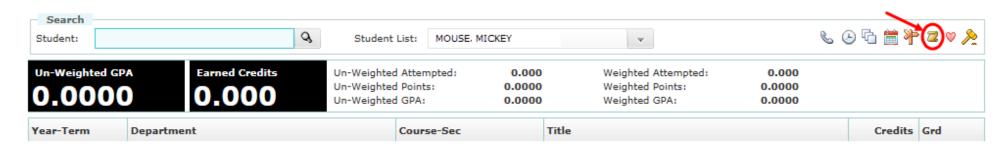
Testing

The Student Testing screen currently only lists all FCAT testing scores both Scale & Achievement. To drill down into each test and they scores click on the word **Expand** or click the plus sign.



Transcript

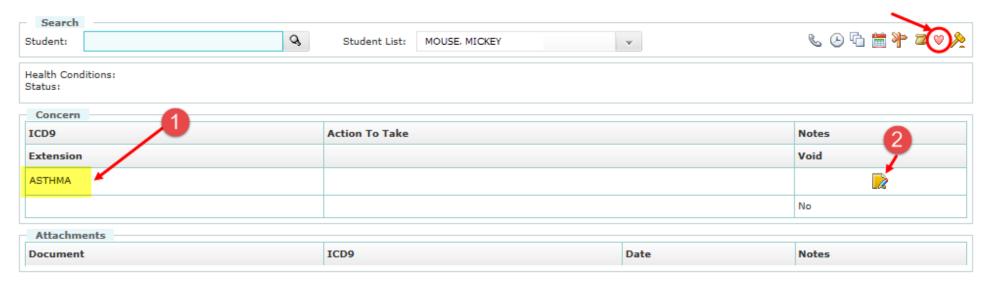
The Student Transcript screen is currently **NOT USED** in Gradebook.



Health

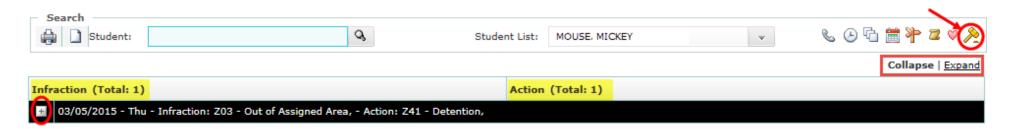
The Student Health $\stackrel{\heartsuit}{}$ screen lists a student's Health issues that a teacher should be aware of. It is determined by the School nurse.

- 1. In the Concerns box it will list the students issues
- 2. If there are any notes from the school nurse they are listed under the notes column. Click on the note icon to view the information.



Discipline

The Student Discipline screen lists ALL recorded discipline events for the school year. To drill down into the specifics of each discipline click on **Expand** or the plus sign to the left of the discipline item. There is a running total of Infractions and actions in the heard of those columns. They are highlighted below.



Reports

Overview Screen

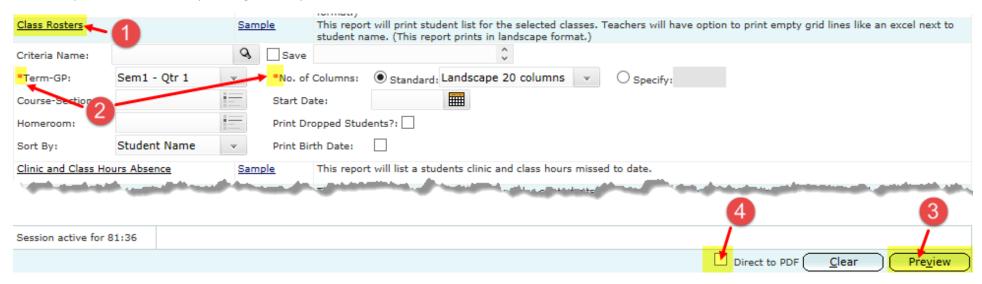
Reports are accessed from the **Reports** icon on the **Function Bar**. A brief description of the report is listed to the right of the title. By clicking on the Sample a snapshot of what the report looks like will show. It does not give you a sample of **YOUR** information.



Overview Setup

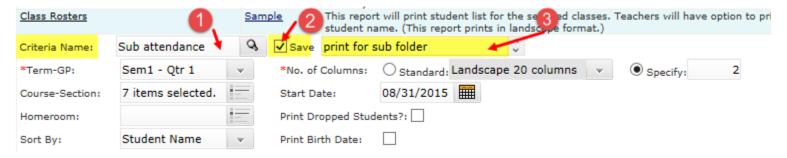
Directions to run a report are below are as follows:

- 1. Clicking on the underlined reports title will drill down to the criteria needed for the report to run.
- 2. Fields that are required are indicated by an asterisk.
- 3. Once the fields are filled out click on the **Preview** button at the bottom right of the screen.
- 4. If you would like the report to go directly to a PDF check the 'Direct to PDF' box.

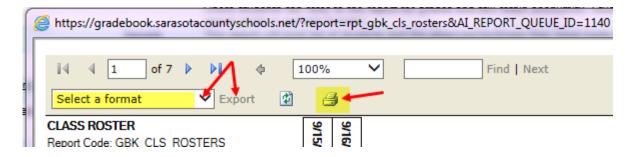


To save the criteria in the report so it can be run again without filling in all the information you must do the following:

- 1. Enter a Criteria Name in the field
- 2. Check the **SAVE** box
- 3. A brief description can be added about the report to help identify it in the notes field.
- 4. Click on the **Preview** button at the bottom of the screen to save it.



- **5.** When the preview window appears the document can be exported or printed.
 - a) After choosing the format from the drop down the word 'Export' will turn green.
 - **b)** Click on export to save the document.
 - a) To print click on the printer icon.



Next time the report needs to be run:

- 1. Click on the magnifying glass.
- **2.** It will list all the versions of the report that you have saved.
- **3.** Click on the version you wish to run.
- 4. Click the Preview button.

