



business_overview_guide

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ASCENDER Business Overview

The ASCENDER Business System is a group of web-based applications that allow you to interact with the database using an Internet browser such as Internet Explorer, Firefox, Google Chrome, or Safari. As the ASCENDER System evolves, the browser versions are updated.

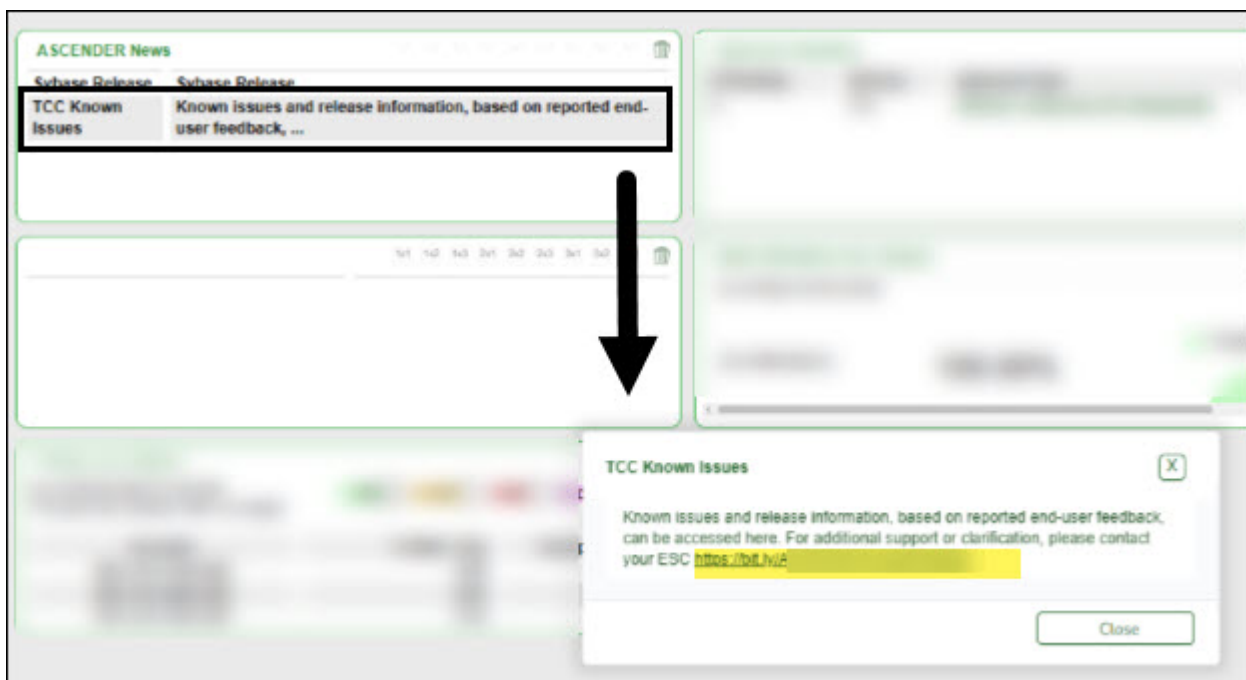
Here are a few tips:

- For adequate viewing, be sure to check your screen resolution settings. The recommended screen resolution setting is 1280×1024.
- It is recommended that you clear your Internet browser's cache each time a release is installed or updated.
- Be sure to access the ASCENDER Browser Settings document for the most current system browser settings information. This document can be found in the online Help.
- If you experience any issues or have questions, please contact your regional Education Service Center.

About Release Notes & Known Issues:

As the ASCENDER software programs are modified, release notes are posted in the corresponding Release Announcement at wiki.ascendertx.com. An ESC consultant login is required to access the Announcements page.

As known issues are identified, they are added to the TCC Known Issues Google document, which is accessible from the ASCENDER Homepage under **ASCENDER News**.



System Requirements and Browser Settings:

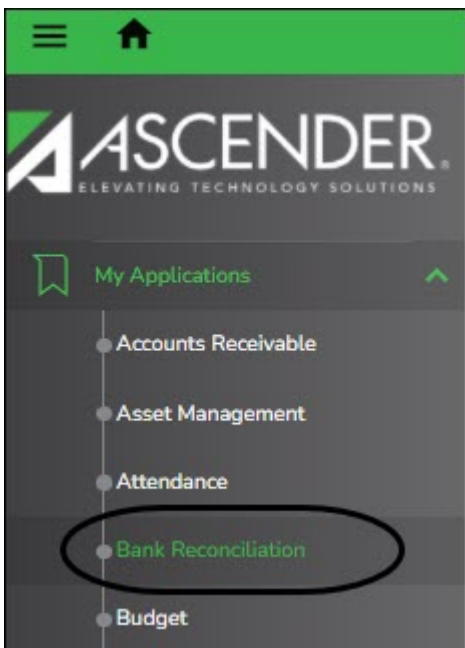
Periodically ensure that your system and browser settings meet the minimum requirements.

For information about system requirements and recommended browser settings, see [ASCENDER Recommended Browser Settings](#).

[ASCENDER Software Terminology:](#)

System - The group of applications supporting a broad area of LEA or campus management, or a specific group of applications (e.g., Business, Student, State Reporting, OCR, District Administration, System Administration).

Application - A particular application within a system (e.g., Accounts Receivable, Payroll).



Page - Selected from a menu or submenu, a page may have multiple tabs, or it may stand alone. A page can have fields, buttons, grids, report parameters, and other features allowing you to accomplish one or more tasks.

Tables > District HR Options Payroll

Save

HR OPTIONS

Retrieve Print

TRS District ID: 3885
 Federal ID Number (EIN): 51-9128683
 Payroll Clearing Fund/Year: 863/B
 TWC District ID: 699939322
 Use Direct Deposit (Y,N, or E): E - Electronic Funds Transfer
 TRS Cost Education Index: 1.0000
 Distributions Built By Amt or %: A - Amount
 Apply Leave Used or Earned First: E - Earned First
 Leave Code for State Sick: 07 STATE SICK
 Leave Code for State Personal: 08 STATE PERSON
 Update Actual Hours From Payroll Processing: ☒

Calculate Accrual Salaries: ☒
 Check Amount - Alpha: ☒
 Summarize Benefits Interface: ☐
 Supplemental Tax Rate: 25.00%
 Standard Hours per Workday: 8.0
 Max Gross Amt for District: 100,000.00
 Auto Assign Employee Number: ☒
 Next Available Employee Number: 901909
 School Year for PEIMS Codes: 2021
 Use Emp Nbr or SSN in EFT File: S - Social Security Nbr
 Set Demo Alpha Fields to Uppercase: ☐

Automatically Compute
 Pay Rate: ☒
 Daily Rate: ☒
 Dock Rate: ☒
 Accrual Rate: ☒
 Overtime Rate: ☒

W-2 Print Options
 TRS: ☒
 HLTH: ☒
 CAF: ☒
 NTA: ☒
 TXA: ☒
 TFB: ☒

Default Overtime Object Code
 Professional: 6118
 Para-Professional/Hourly: 6121
 Other: 6125

TEA Health Ins Contribution

	Amount	Obj	Subj
Payroll 4:	0.00		
Payroll 5:	0.00		
Payroll 6:	37.50	6142	

First Pay Date of School Year

Payroll 4: 09-01-2021
 Payroll 5: 09-01-2021
 Payroll 6: 09-01-2021

TRS Extract Options

Use Pay Dates for TRS Month or Actual Date: A - Actual Hours Table Date
 Pay Type 1 - Report Actual or Scheduled Hours: A - Actual Hours
 Pay Type 2 - Report Actual or Scheduled Hours: A - Actual Hours
 Pay Type 3 - Report Actual or Scheduled Hours: A - Actual Hours

Tab - Some pages have multiple tabs allowing you to accomplish tasks that can be logically grouped together.

Maintenance > Staff Job/Pay Data Payroll

Save

Employee:

Retrieve Directory

PAY INFO JOB INFO DISTRIBUTIONS DEDUCTIONS LEAVE BALANCE

Field - A mechanism for inputting data, such as a text entry box, drop-down list, check box, or radio button. Each field has a label, such as the **Employee Status** field. Note that in ASCENDER online Help and other documentation, field names are displayed in bold font.

Employee Status: 1 Active professional ▼

Highest Degree: 1 Bachelor's ▼

Percent Day Employed: 100%

Eligible for Re-hire: ☐

Extract ID: ▼

W-2 Elec Consent: ▼

1095 Elec Consent: ▼

Report Parameters - Fields that allow you to input criteria for running reports. You will notice some report parameters are heavily bolded, which means that data input is required for that parameter.

Parameter Description	Value
Sort by Alpha (A), Pay Campus (C), Primary Campus (P)	<input type="text"/>
Print Address Primary (P), Alternate (A)	<input type="text"/>
Select Restriction Local (L), Public (P), or No restrictions (N)	<input type="text"/>
Include Primary Job Code? (Y/N)	<input type="text"/>
Pay Status Active (A), Inactive (I), or blank for ALL	<input type="text"/>
Pay Type 1-4, Exclude Subs (E), or blank for ALL	<input type="text"/>
Select Pay Campus(es), or blank for ALL	<input type="text"/>
Select Primary Campus(es), or blank for ALL	<input type="text"/>
Select Extract ID(s), or blank for ALL	<input type="text"/>
Select Employee(s), or blank for ALL	<input type="text"/>
Select Frequency	<input type="text"/>

Grid - A group of records displayed in columns and rows, or empty columns and rows in which to add new records, such as a table maintenance page.

PAY INFO JOB INFO <u>DISTRIBUTIONS</u> DEDUCTIONS LEAVE BALANCE							
Delete	Details	Job Code	Extra Duty	Account Type	Account Code	Amount	Percent
		1107 - PEIMS/DIR FED PGMS/FS		G	199-41-6129.01-750-899000	46,059.00	100.000%
Total:						46,059.00	100.000%
Rows: 1 of 1 Refresh Totals Add							

Login

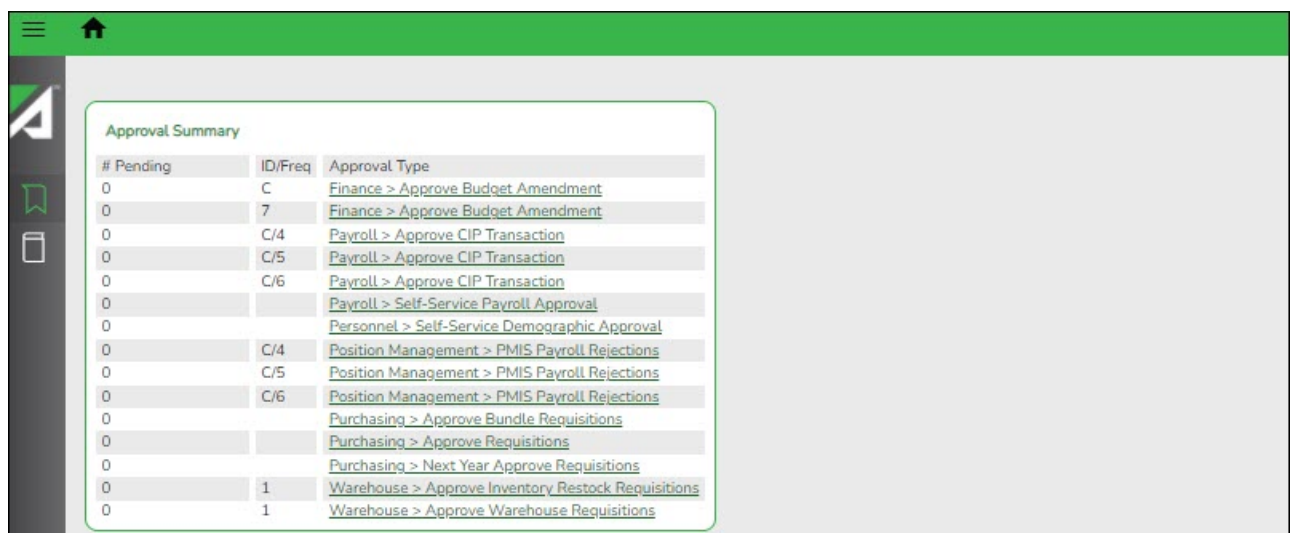
- [Login Page:](#)

Login

Field	Description
User Name	Type your user ID or name provided by your local education agency (LEA).

Field	Description
Password	Type your password. The text is displayed as black dots for privacy. Requirements: <ul style="list-style-type: none"> • 16-46 alphanumeric characters • Three of the following: uppercase, lowercase, numeric, and special characters • Case-sensitive Other password requirements such as the number of invalid password attempts, lockout period, and the number of password expiration days are set by your district administrator.
County/District Number	Type your six-digit county-district number.
Browser Requirements	The currently supported browsers are listed.
Social Media Icons	Click to access various social media sites for ASCENDER.


Click **Login** or press ENTER to complete the login process. The ASCENDER Homepage is displayed.

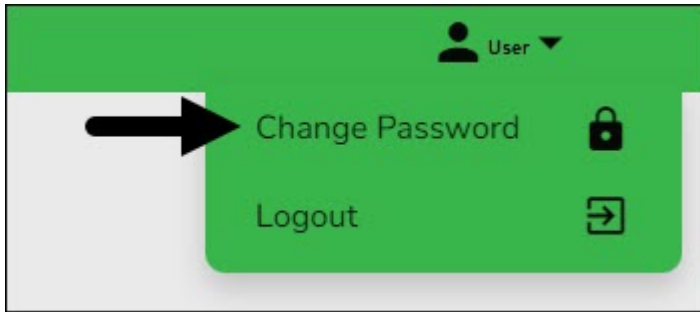


# Pending	ID/Freq	Approval Type
0	C	Finance > Approve Budget Amendment
0	7	Finance > Approve Budget Amendment
0	C/4	Payroll > Approve CIP Transaction
0	C/5	Payroll > Approve CIP Transaction
0	C/6	Payroll > Approve CIP Transaction
0		Payroll > Self-Service Payroll Approval
0		Personnel > Self-Service Demographic Approval
0	C/4	Position Management > PMIS Payroll Rejections
0	C/5	Position Management > PMIS Payroll Rejections
0	C/6	Position Management > PMIS Payroll Rejections
0		Purchasing > Approve Bundle Requisitions
0		Purchasing > Approve Requisitions
0		Purchasing > Next Year Approve Requisitions
0	1	Warehouse > Approve Inventory Restock Requisitions
0	1	Warehouse > Approve Warehouse Requisitions

- [Change Password:](#)

Change Password

To change your password, from the ASCENDER Homepage, click  next to your user name and then click **Change Password**.



The Change Password page is displayed.

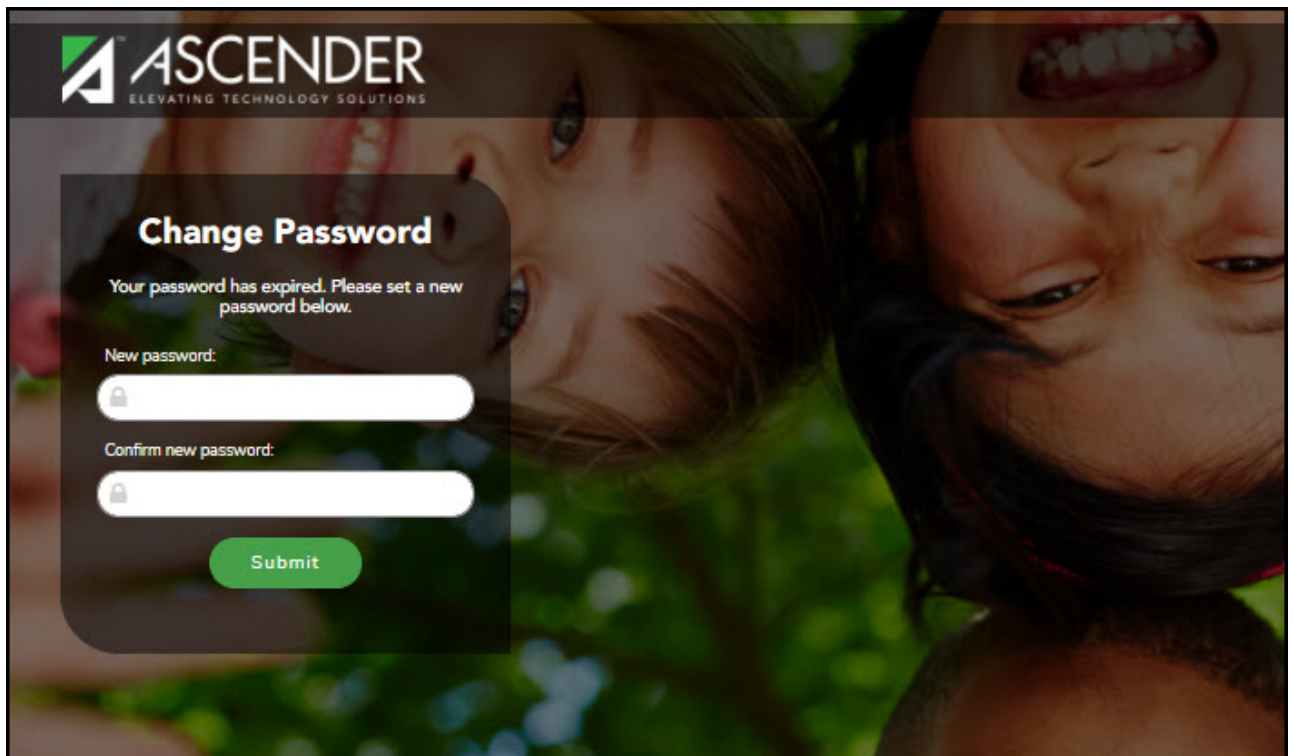
A screenshot of the ASCENDER 'Change Password' form. The form is overlaid on a dark background with a blurred image of a person's face. The ASCENDER logo is in the top left corner. The form contains the following fields: 'User ID: User', 'Old Password:', 'New password:', and 'Confirm Password:'. Each password field has a lock icon on the left. At the bottom of the form are two buttons: 'Save' (green) and 'Cancel' (white with a green border).

User ID	Displays your LEA-issued user ID.
Old Password	Type your old (current) password.
New Password	Type a new password. Requirements: <ul style="list-style-type: none">• 16-46 alphanumeric characters• Three of the following: uppercase, lowercase, numeric, and special characters• Case-sensitive
Confirm Password	Retype your new password to confirm.

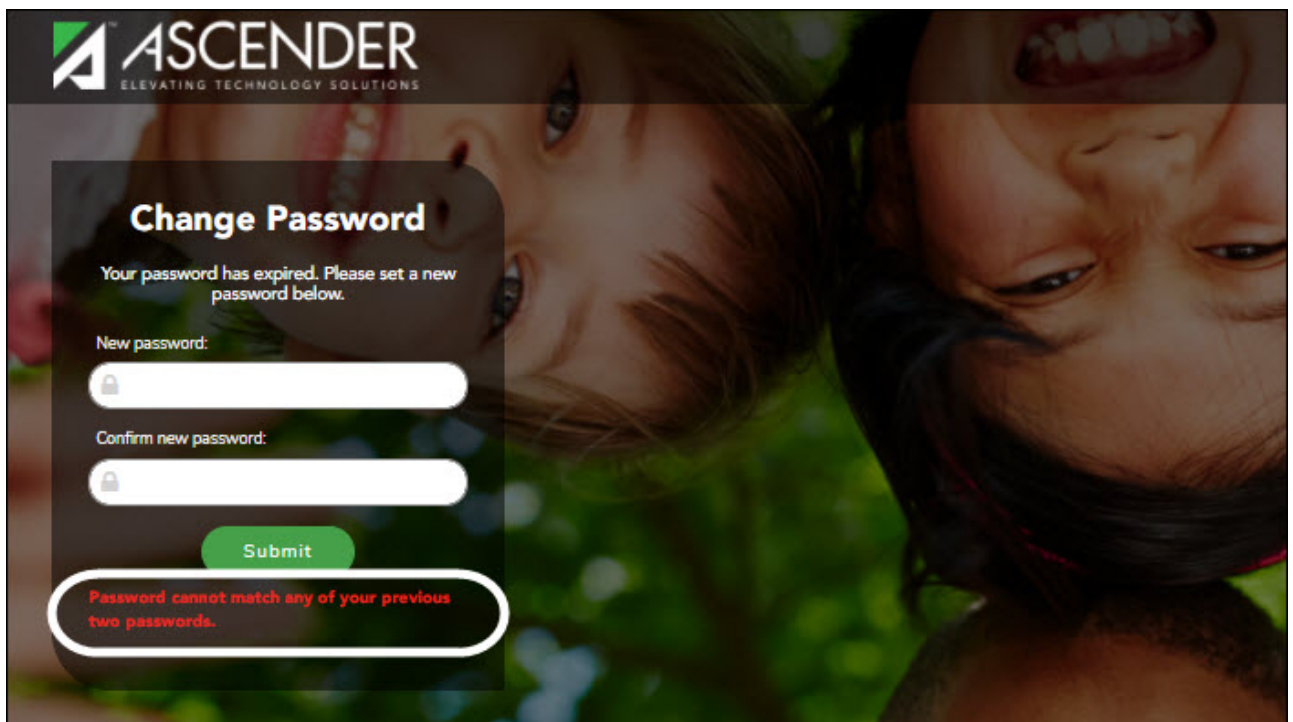
Click **Save** to save your new password.

Click **Cancel** to cancel the request and return to the ASCENDER Homepage.

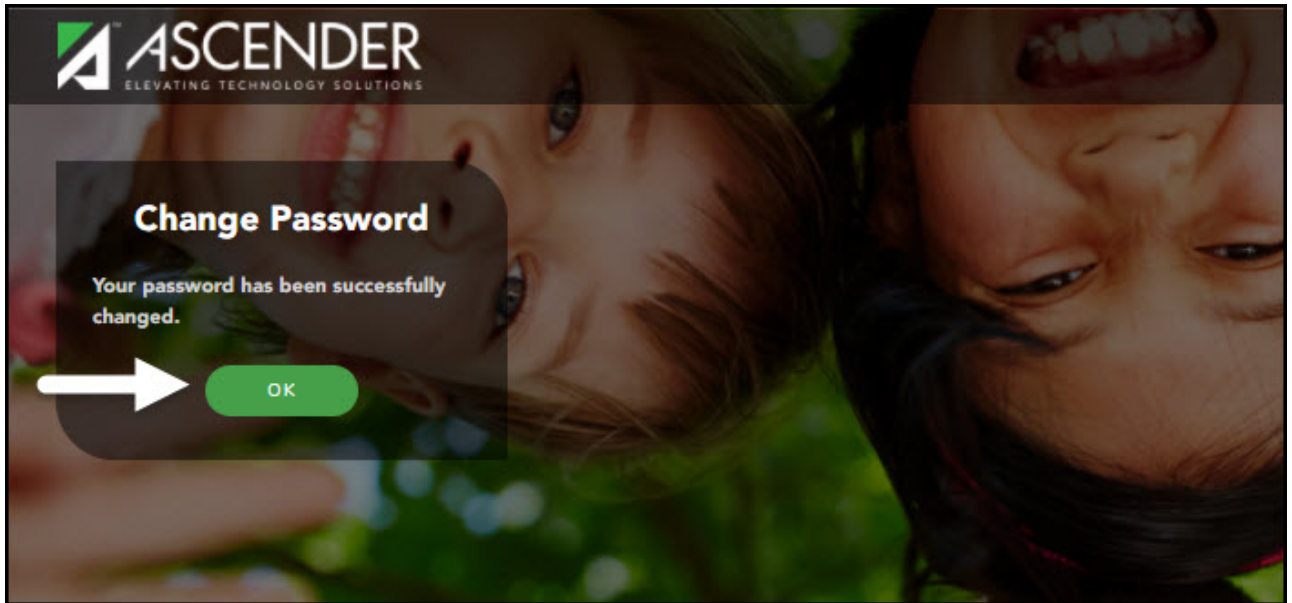
If your password expires, the following Change Password page is displayed.



You will be prevented from reusing a previous password.




The following page is displayed upon successfully changing your password:



- **Exit & Logout:**

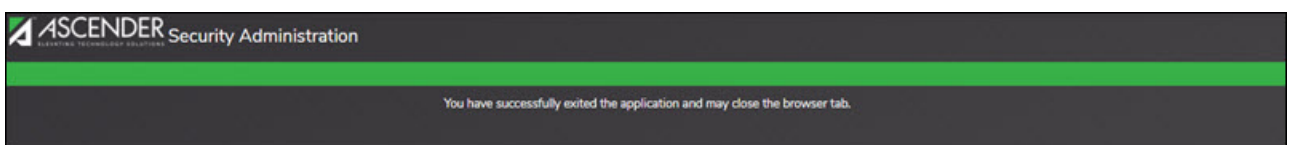
It is important to exit and log out correctly to ensure that the software functions properly.

Exit Application


To exit any open application, in the top-right corner of each application next to your user name, click .



An exit application page is displayed with a message indicating that you have logged out successfully and you may close the browser tab.

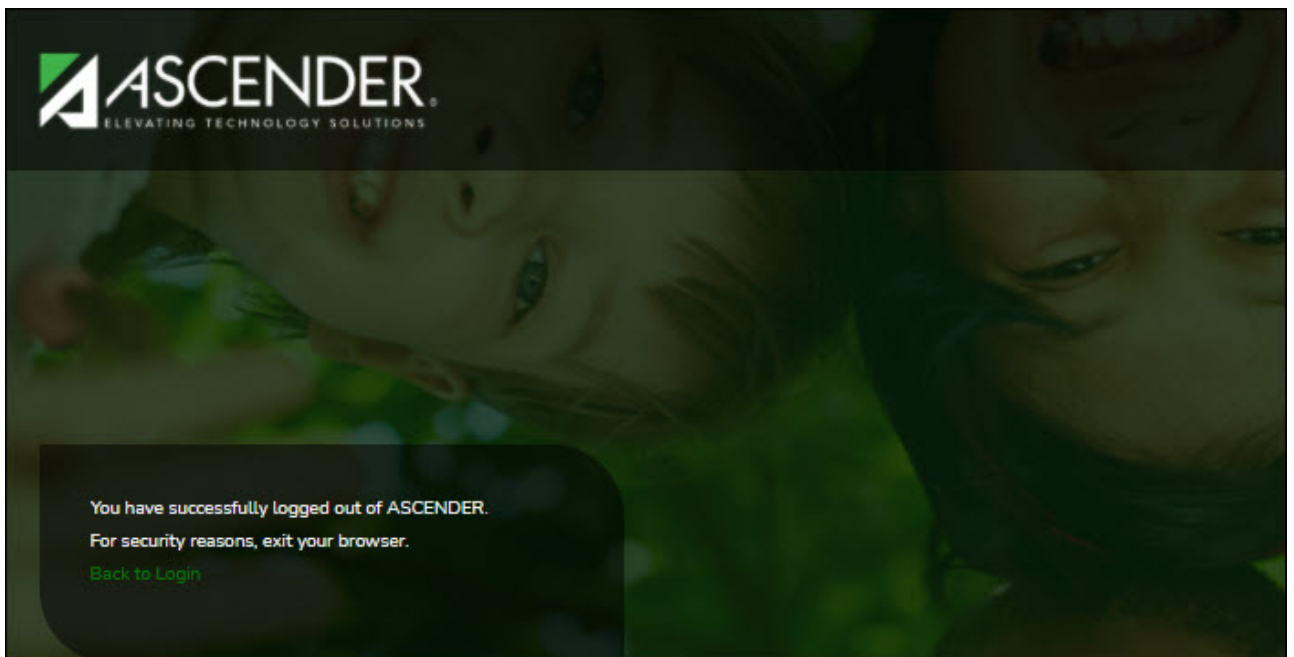


Logout

From the ASCENDER homepage, in the top-right corner of the page next to your user name, click  and then click **Logout**.



The Logout page is displayed confirming that you have logged out of ASCENDER successfully.



Click **Back to Login** to return to the ASCENDER Login page.


Incorrect Logout Method

It is important to remember that if you click X on your browser to exit an application or log out of ASCENDER, various issues including table locks in the system can occur. You must contact your technical department for further assistance, which may include disconnecting the connection in Sybase to clear the table locks.

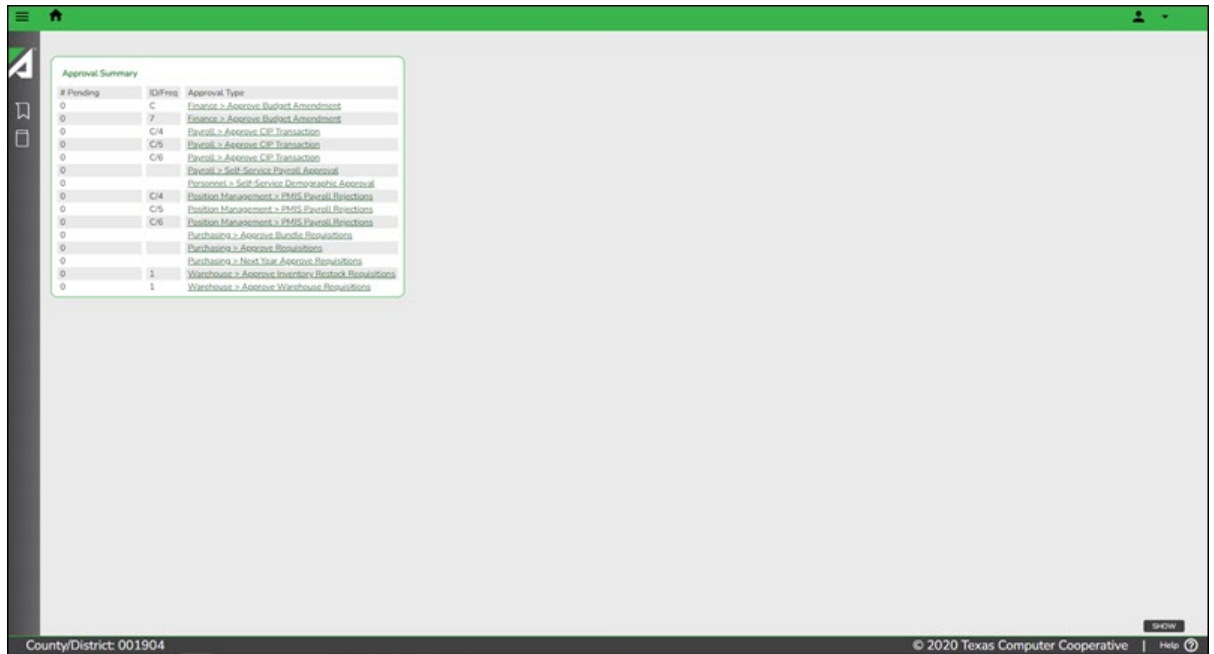
Navigation

- [Applications:](#)

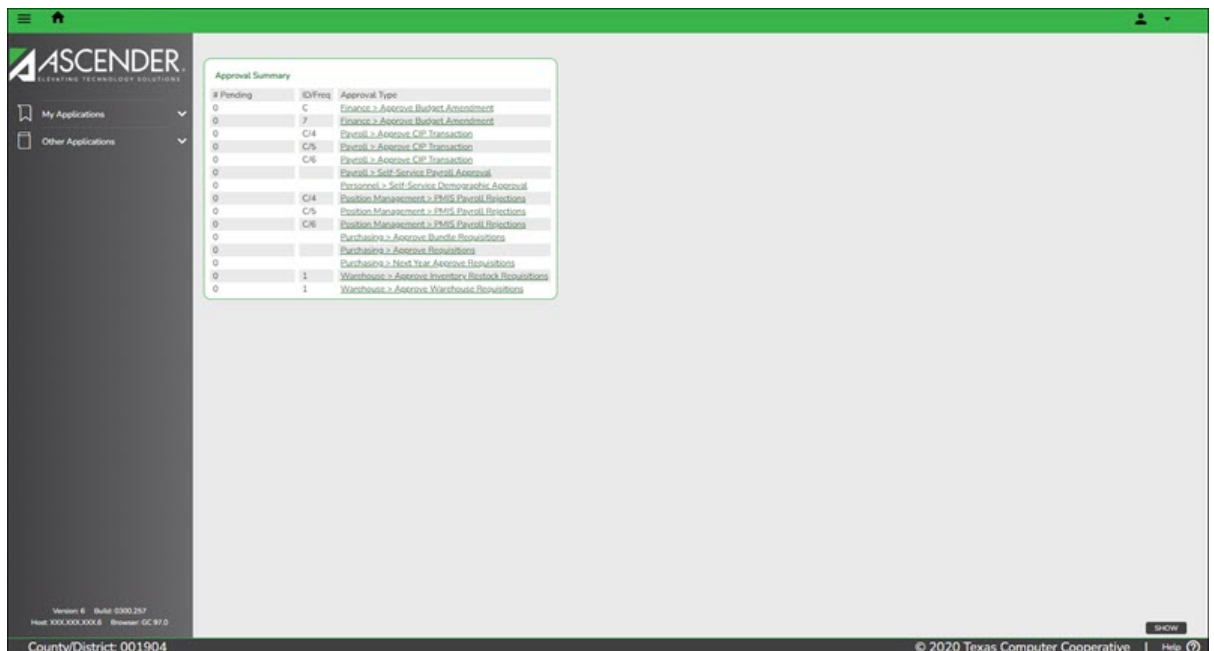
The ASCENDER homepage serves as a personalized dashboard and displays links to all ASCENDER applications that are tied to your user profile.

The main menu is located on the left side of the page. In the upper-left corner, click  to collapse the main menu or expand the main menu. This functionality is available on all pages in all applications. And, on some pages must be used for a more favorable view of the actual page.

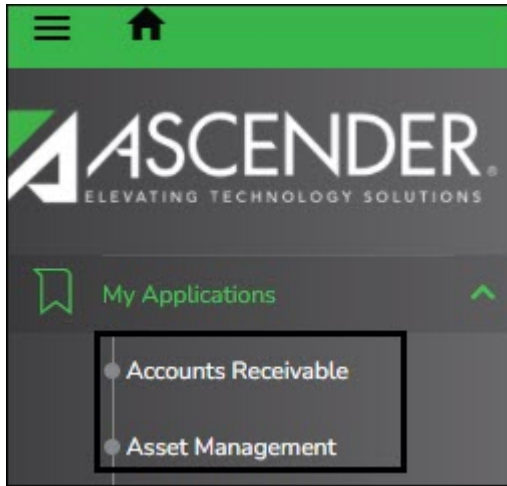
Collapsed view - The main menu is hidden.



Expanded view - The main menu is open.



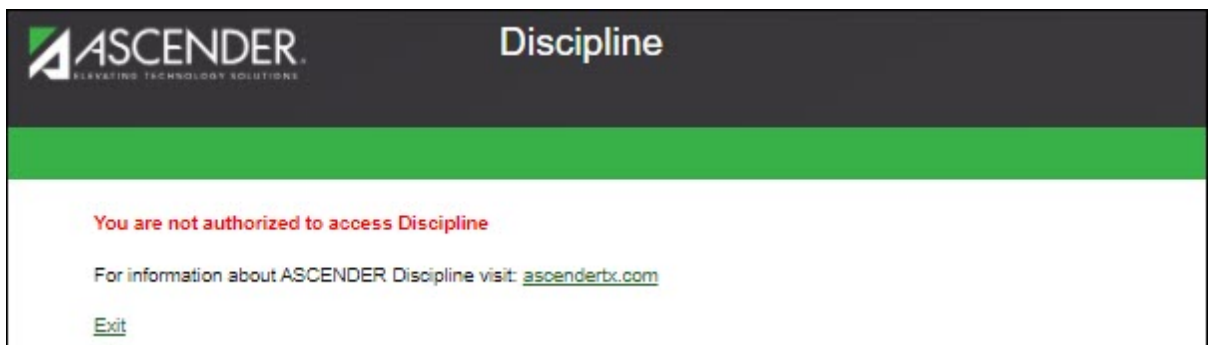
Depending on your view, click  or **My Applications** to view a list of applications to which you have rights.



All other applications are listed under **Other Applications**. Click  to view a list of other applications to which you do not have rights.

Access rights for each application must be set in Security Administration by a user with access to that system.

If you attempt to open an application you do not have rights to, the following page is displayed:

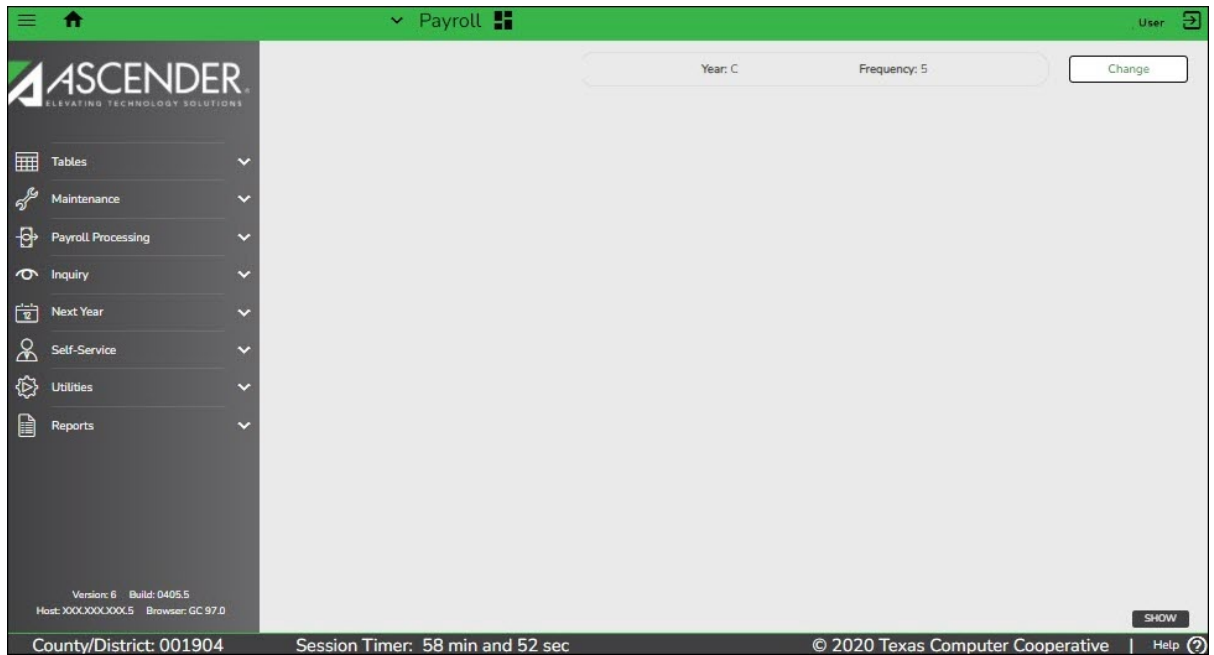


Click **Exit** to return to the ASCENDER homepage.

- **Menu & Tabs:**

Menu and Tabs

After you select an application from the ASCENDER homepage, the application homepage is displayed. In the below example, the Payroll application is selected.



Select a main menu item (e.g., Tables, Maintenance, Inquiry, etc.). The available submenu options are displayed. Use the gray scroll bar to scroll up and down and view any additional submenu options.



Select the menu or submenu options for the page you want to display.

Many pages consist of multiple tabs. Click the tab to be displayed. You will notice a difference in font color. The tab that is currently open on the page displays in green font and is underlined. All other tab names are black with no underline. Click another tab name to view data on a different tab.

Maintenance > Staff Job/Pay Data

Payroll

Save

Employee:

Retrieve Directory

PAY INFO JOB INFO DISTRIBUTIONS DEDUCTIONS LEAVE BALANCE

If a tab is disabled (grayed out), you may not have security permission to access the tab, the tab may not be available in the setting (year or pay frequency) to which you are logged on, or a process on another tab may need to be performed before the tab is enabled.

For example, the Leave Balance tab is disabled when a user is logged on to the next year pay frequency.

Maintenance > Staff Job/Pay Data

Payroll

Save

Year: N

Employee: 000689 Retrieve Directory Documents

PAY INFO JOB INFO DISTRIBUTIONS DEDUCTIONS LEAVE BALANCE

Change Application

From any application page, you can open a new application. At the top of the page next to the open application name (in this case Payroll), click . A list of all ASCENDER applications is displayed in alphabetical order. Select the application you want to open. A separate browser tab opens with the newly selected application homepage.

Maintenance > Staff Job/Pay Data

Payroll

Save

Employee: 000689 Retrieve

PAY INFO JOB INFO DISTRIBUTIONS DEDUCTIONS LEAVE BALANCE

Pay Status: 2 Inactive Tax Exempt: ☐

Pay Campus: Unemployment Elig: ☒

Pay Dept: FICA Eligibility: M Subject to medicare

Dock Rate: 0.000 W4 Marital Status: Single

Nbr of Exemptions: 0

ASCENDER Home

Accounts Receivable

Asset Management

Bank Reconciliation

Budget

District Administration

Finance

Grants And Projects

Payroll

Personnel

Position Management

Purchasing

Security Administration

State Reporting

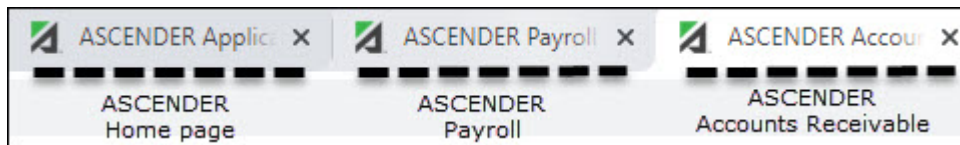
Warehouse

TRS FSP Staff Salary Data Totals

Application Tabs

Open applications are set up to display as separate browser tabs so you can easily

navigate from one application to another.



If you have multiple applications open, you can navigate to an open application without exiting from any one application by selecting the associated browser tab located at the top of the page.

Note: The session timer operates separately for each application, which may cause you to receive a session timeout message from one application while you are in another application.

Review the Session Timers section for more information about setting up session timers.

Multiple pages (i.e., menu items) cannot be displayed within an application. When a new menu selection is made, the current page is no longer displayed. If data modifications are made on the page and the changes are not saved, an unsaved data warning message is displayed. You can select to leave the page without saving the changes or remain on the page to continue making changes or save the changes on the page.

- [Change File ID, Accounting Period, or Payroll Frequency.](#)

Change Feature

In the top-right corner of the page, the Change feature allows you to change the file ID, year, accounting period, payroll frequency, and warehouse ID. This feature is only available if you are logged on to the following applications:

- Asset Management (file ID)
- Budget (file ID)
- Finance (year and accounting period)
- Payroll (year and frequency)
- Position Management (year and frequency)
- Warehouse (warehouse ID)

Depending on the application to which you are logged on, click **Change** to enable the applicable change fields.

The screenshot shows a user interface with a green header bar containing a 'User' label and a profile icon. Below the header, there are two input fields: 'Year: C' and 'Frequency: 5'. To the right of these fields is a 'Change' button. A black arrow points from the 'Frequency' field towards the 'Change' button.

Depending on the application, the drop-down field(s) are enabled. Click ▼ to view a list of the applicable years, file IDs, accounting periods, or payroll frequencies. Select the applicable option(s) and click **Apply**. The application data changes to match your selection.

The screenshot shows a user interface with a green header bar containing a 'User' label and a profile icon. Below the header, there are two dropdown menus: 'Year: Current Year' and 'Frequency: 5 - Semimonthly CYR'. The 'Year' dropdown is open, showing options: 'Current Year' (highlighted in blue) and 'Next Year'. To the right of these dropdowns are 'Apply' and 'Cancel' buttons. A black arrow points from the top of the 'Apply' button towards the dropdown menus.

Click **Cancel** to cancel the changes.

- [Software Version:](#)

Software Version

The following information is displayed at the lower-left corner of the page under the main menu.

```
Version: 6   Build: 0405.5
Host: XXX.XXX.XXX.5   Browser: GC 97.0
```

Version	Displays the ASCENDER software version.
Build	Displays the ASCENDER software build number.
Host	Displays the software server host information.
Browser	Displays the browser and version details (e.g., Google Chrome Version 85.0).

- [County District:](#)

County District

The following information is displayed in the lower-left corner of the page under the software version details.

County/District: 101905

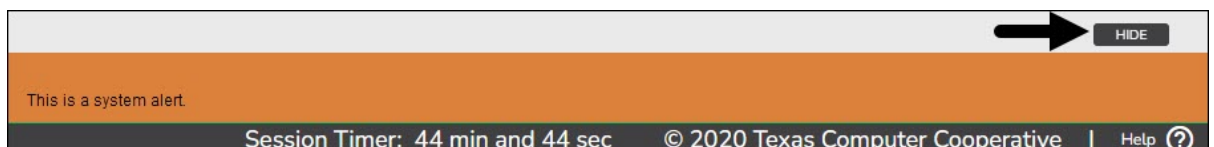
County/District	Displays the county district number to which you are logged on. To change this number, log out and log back in with a different number.
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- [System Alerts & Feedback:](#)

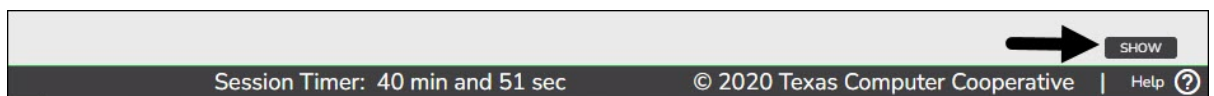
System Alerts

At the bottom of each page, there is an orange message line that displays any system alerts.

Click **Hide** to hide the message line. The message line will remain hidden as you navigate to other tabs within the same page. The message line will show again if you navigate to a new menu item or when a record is saved.



Click **Show** to show the message line.



- [Online Help:](#)

Online Help

Access the ASCENDER online Help by clicking the Help button in the lower-right corner of the page.



The Help topic is specific to the application page. You can browse other Help topics from the Help window. Online Help is available for all applications and is page sensitive. Additionally, you can access a variety of process-specific guides and checklists in the Online Help.

Review the [ASCENDER Online Help](#) page for more information.

- [Session Timers:](#)

Session Timers

Across the bottom of each application page, a session timer is displayed. As each page is displayed, the timer resets.

Session Timer: 188 min and 43 sec

Review the [Session Timers](#) Help page in District Administration for more information about session timers.

Retrieve & Maintain Data

From each page or tab, data can be retrieved, viewed, added, deleted, and modified using the following tools:

- [Auto features](#)

Autotab

The autotab feature eliminates the need to manually click in or tab to the next field. Instead, the next defined text field automatically receives the cursor focus when the maximum number of characters in the current text field is reached.

In the example below, as you type a 20-digit account code number in nine separate boxes, you do not need to tab to each box. If you type a three-digit fund number in the **Fund** field, the cursor focus automatically tabs to the next field and so on.

When the cursor moves to a new field, all of the characters in that field will be highlighted.

If you are replacing the data, on your first keystroke of the new data, all of the old data will be deleted, and you can type the new data.

You may also use your arrow keys to move to any specific part of the data in the field to update or replace the data, such as spelling or changing numbers in a sequence.

Autosuggest

The autosuggest feature allows you to type in specific data, as you type the data, a drop-

down list of corresponding data is displayed. You can make a selection from the drop-down list, scroll through the drop-down list, or type new data in the field.


Depending on the field and page, press the SPACEBAR to view a list (in some cases limited) of available options for the field.


- [Add and delete rows](#)

Add a Row

In a table or grid, click **+Add** to add a new data entry row. A new row is added to the bottom of the grid or list.

Delete a Row

Click  to delete a row. This icon is displayed next to any row that can be deleted. The row is shaded red to indicate that it will be deleted when the record is saved.

If you do not want to delete the selected row, click  again to unselect the row for deletion.

Tables > Credit Card Codes Finance

Save

CREDIT CARD CODES DUE TO FUND

Starting Credit Card Code: Retrieve Print

Delete	Credit Card Code	Description	Vendor Nbr	Sort Key / Vendor Name	Fund	Func	Obj	Sobj	Qtr	Fiscal Year	Perm	Ed	Project Detail	Active
	BQA	BANK OF AMERICA MC	39690	BANK OF AMERICA MASTERCARD / BANK OF AMERICA MASTERCARD	180	00	2110	23	000	X	00	0	00	<input checked="" type="checkbox"/>
	HOME	HOME DEPOT	37811	HOME DEPOT / HOME DEPOT	180	00	2110	22	000	X	00	0	00	<input checked="" type="checkbox"/>
	OFFMAX	OFFICEMAX	36417	OFFICEMAX CREDIT PLAN / OFFICEMAX CREDIT PLAN	180	00	2110	23	000	X	00	0	00	<input checked="" type="checkbox"/>
	WELLS	WELLS FARGO VISA	39689	WELLS FARGO VISA / WELLS FARGO VISA	180	00	2110	22	000	X	00	0	00	<input checked="" type="checkbox"/>

First 1 / 1 Last

If restrictions exist, a message is displayed indicating the reason.

- Column sort

Column Sort

When a column heading is underlined, the column can be sorted. Click the column to sort the data in ascending order, and then click the column again to sort the data in descending order.

Tables > Account Codes Finance

Save

FUND FUNCTION OBJECT SUB OBJECT ORGANIZATION PROGRAM EDUCATIONAL SPAN PROJECT DETAIL

Retrieve Print

Delete	<u>Fund /</u> <u>Fscal year</u>	Fund Type	Fund Description	Budget Fund Balance Obj Sobj	Actual Fund Balance Obj Sobj
	180 / 9	G - General operating	CREDIT CARD CLEARING	3700.00	3600.00
	180 / 9	G - General operating	CREDIT CARD CLEARING	3700.00	3600.00

▲ - indicates that the column is sorted in ascending order

▼ - indicates that the column is sorted in descending order

- Pagination

Pagination

Depending on the page, approximately 30 rows of data is displayed or can be viewed with the use of the scroll bar. If the data exceeds the number of rows that can be displayed on the page, the page numbers are displayed on the bottom-left side of the page.



You can view and select which pages to display from the drop down. Or, you can click the arrow icons on either side of the page numbers to move between pages.

The pagination feature on some pages includes the range of data per page. In the below image, the page is sorted by **Fund** so each page displays the fund range listed on that page so you can find funds 180-240 on page 1 and so on.

Delete	Fund / Fscf year	Fund Type
	180 / 8	G - General operating
	180 / 9	G - General operating
	197 / 8	G - General operating
	199 / 7	G - General operating
	199 / 8	G - General operating
	199 / 9	G - General operating
	206 / 8	S - Special revenue
	206 / 9	S - Special revenue
	209 / 8	S - Special revenue
	209 / 9	S - Special revenue
	210 / 8	S - Special revenue
	211 / 7	S - Special revenue
	211 / 8	S - Special revenue
	211 / 9	S - Special revenue
	212 / 8	S - Special revenue
	224 / 8	S - Special revenue
	224 / 9	S - Special revenue
	225 / 8	S - Special revenue
	240 / 8	S - Special revenue
	240 / 9	S - Special revenue
	/	

First ◀ 1: 180 / 8 - 240 / 9 ▼ / 3 ▶ Last


1: 180 / 8 - 240 / 9
2: 242 / 8 - 699 / 9
3: 863 / 8 - 902 / 8

You can navigate between pages by using the below buttons:

Click **First** to go to the first page.

Click ◀ to go back one page.

Click ▶ to go forward one page.

Click  to go to the last page.

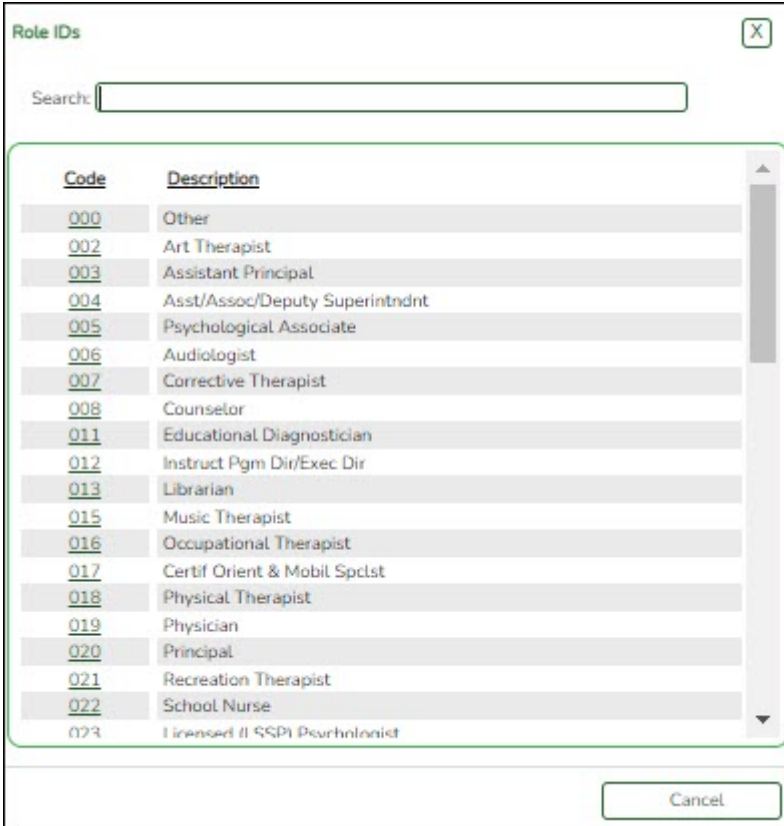
- [Ellipsis icon](#)

Ellipsis Icon

The ellipsis icon is displayed next to a field and remains on the page at all times. You do not have to tab into the field for it to be displayed.

Click  to display a pop-up window with data that corresponds to the field.

Click the link of the option to be populated in the field.




Code	Description
000	Other
002	Art Therapist
003	Assistant Principal
004	Asst/Assoc/Deputy Superintndnt
005	Psychological Associate
006	Audiologist
007	Corrective Therapist
008	Counselor
011	Educational Diagnostician
012	Instruct Pgm Dir/Exec Dir
013	Librarian
015	Music Therapist
016	Occupational Therapist
017	Certif Orient & Mobil Spclst
018	Physical Therapist
019	Physician
020	Principal
021	Recreation Therapist
022	School Nurse
023	Licensed II SSPJ Psychologist

Otherwise, click **Cancel** or **X** to close the pop-up window without making a selection.

- [Spyglass icon](#)

Spyglass Icon

The spyglass icon is used on several pages to view additional details for a record.

Click  to view additional details. The details are displayed in various ways depending on the application page. On some pages, a pop-up window opens with the corresponding details, and on other pages, additional details might be displayed in a different grid as seen in the below example.

Requisition Information

Reqs	Req Nbr	PO Nbr	Requestor	Date Requested	Campus/Dept	Vendor Nbr	Vendor Name	Bid Category	Amount	Status	Req Per	Priority	Reason	On
	013964	181964		09-14-2020	003 - 003 School	95000	123 EZ TEES INC		100.00	Approved	04	Regular		GD
	013970	181968		04-13-2021	001 - 001 School	95000	123 EZ TEES INC		10.00	Approved	04	Regular		GD

First 1 / 1 Last

Requisition Nbr: 013964

Note	Accounts	Item	Item Apprvl Stat	Item Recv Stat	Catalog Nbr	Description	Unit of Issue	Unit Price	Quantity	Sub Total	Discount %	Discount Amount	Freight E
	Accounts	001	Approved	Partial shipment recvd	ABC	School boxes	1N - Count	10.00000	10.00	100.00	0.00%	0.00	Y

Approval Path

Sequence	Approval User	Title	Alternate User	Print name
1		UNDEFINED		Y
2		UNDEFINED		N
9		UNDEFINED		N
10		UNDEFINED		Y
11		UNDEFINED		Y

- [Save changes](#)

Save Changes

To save changes on a page, click the **Save** button. You can also press ENTER on your keyboard to retrieve or save, depending where you are on the page.

If you are in a search area of the page, the retrieve feature is the default setting when you press ENTER.

If you are in the body of the page, the save feature is the default setting when you press ENTER.

Reports

Numerous reports are available in ASCENDER. Most applications also offer a Create Report page allowing you to create customized reports.

- [Generate a Report:](#)

Generate a Report

Generate a Report

Select a report:

All available report names are displayed on the left side of the page. The list of available

reports remains displayed on the page even after you select a report name. This allows you to select another report within the selected reports menu without exiting the report page.

- ☐ Click a report to select it. The parameters for the selected report are displayed on the right side of the page.
- ☐ Type or select the report options. **Parameters in bold are required.**
- ☐ Use the buttons located at the top of the page to generate the report.





If the button feature does not apply to the selected report, it is disabled. For example, a certain report may not be available in the CSV format, so the **CSV** button will be disabled when that report is selected.

- **Preview** - Click to generate the HTML view of the report.
- **PDF** - Click to generate a PDF file of the report.
- **CSV** - Click to generate a CSV file of the report.
- **Clear Options** - Click to clear data from all parameter fields.


Review, save and/or print the report:

Review the report using the following buttons:


Click  to go to the first page of the report.


Click  to go back one page.

Click  to go forward one page.

Click  to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click  to save and print the report in PDF format.

Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.

Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Sort and filter:

Some reports may or may not provide the sort and/or filter option.

Sort	<p>Sort report data:</p> <p>You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.</p> <p>From the report window, click Sort/Filter to open the Sort/Filter window. By default, the Sort Criteria section is expanded. If not, click Sort Criteria.</p> <table border="1" data-bbox="371 309 1479 748"> <tr> <td data-bbox="371 309 651 454">(Left grid) Columns Available for Sorting</td><td data-bbox="659 309 1479 454">Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under Sort Columns. Continue moving columns to the right grid as needed.</td></tr> <tr> <td data-bbox="371 465 651 748">(Right grid) Sort Columns</td><td data-bbox="659 465 1479 748"> <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p> </td></tr> </table> <p>Click OK to apply the selected sort criteria to the report.</p> <p>Click Cancel to close the window without re-sorting.</p>	(Left grid) Columns Available for Sorting	Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under Sort Columns . Continue moving columns to the right grid as needed.	(Right grid) Sort Columns	<p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p>
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(Right grid) Sort Columns	<p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p>				

Filter	Filter report data: When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option. From the report window, click Sort/Filter to open the Sort/Filter window. By default, the Sort Criteria section is expanded. Click Filter Criteria to expand the Filter Criteria section. If the report does not allow sorting, the Filter button is displayed instead of the Sort/Filter button, and sort criterion fields are not available. Click Add Criterion to add new filter criteria. A blank row is displayed in the grid.	
	Field	Description
	Column	Select a column by which to filter the data. The drop down lists the columns that appear on the report.
	Operator	Select an operator. = Equals ≠ Not equals < Less than ≤ Less than or equal to > Greater than ≥ Greater than or equal to
	Value	Type the value by which you want to filter. For example, if you selected a date in the Column field, type a date to view only data for a specific date.
Other functions and features:		
	Add Criterion	Add another row. Select the logical connector (<i>AND</i> or <i>OR</i>) in the Logical field. Continue adding rows as needed. Using the <i>AND</i> operator limits search results, because the program looks only for records that contain both criterion. Using the <i>OR</i> operator expands search results, because the program looks for records that contain either one criterion or the other, or both.
	Delete Selected	Delete selected row. Select the row, and then click the Delete Selected button. The row is deleted from the filter criteria.
Click OK to apply the selected filter criteria to the report. Click Cancel to close the dialog box without applying a filter.		
	Reset	Reset report data. Click to restore the report to the original view, removing all sorting and filtering that has been applied.
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- [User Created Report:](#)

Create a Report

Run a report from a saved template:

Report Template	<p>Begin typing all or part of the name of an existing report template, or press the space bar to view all the templates. As you begin to type, a drop-down list displays report templates with titles that match the letters you have typed. From the drop-down list you can select the template. Only templates you created are listed in the drop-down list.</p> <p>If you do not know the name of the report template, click Directory to select a report template from the directory. From the directory, you can select templates you created as well as public templates.</p>
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Create a new template:

Report Template	Type the name of a new report template. Only alphanumeric characters are allowed. If you type a name that is already used, it will overwrite the previous template.
Public	Select to make the report accessible to other users. All users in the district who have access to this page will be able to use the template.

- After entering the title and selecting the columns to include, click **Save**.

Create a new report:

Report Title	Type a title for the report, up to 35 characters.
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- The fields are grouped by business table. Select the fields for which you want to print information. You can select an entire group of fields by selecting the group name (e.g., **PMIS Position Distribution**).
- Click **Create Report** to generate the report.