TxEIS Student

OVERVIEW

Developed by the

TEXAS COMPUTER COOPERATIVE

Texas Computer Cooperative

TxEIS★iTCCS

Contents

OVERVIEW

The TxEIS Student system is a group of web applications that allow you to interact with your database using a simple Internet Browser such as Internet Explorer, Firefox, Chrome, or Safari.

Release Notes & Known Issues

As the TxEIS software programs are modified, release notes are posted on the TxEIS Resources page at txeis.net. An ESC consultant login is required to access the page. If known issues are identified for a particular release or update, a Known Issues document is also posted.

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 the System Requirements link found on the Contents tab of the TxEIS online Help system.

TxEIS Software Terminology

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

Application - A particular application within a system (e.g., Attendance, Registration).

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.

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

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 Grade Level. In TxEIS documentation, field names are displayed in bold font.

**Report Parameters** - Fields that allow you to specify criteria for running reports.

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.

Free Form Area: A group of fields below a grid. Data is entered in the fields below the grid, rather than in the grid. Once the record is saved, the data is displayed in a grid.

LOGIN
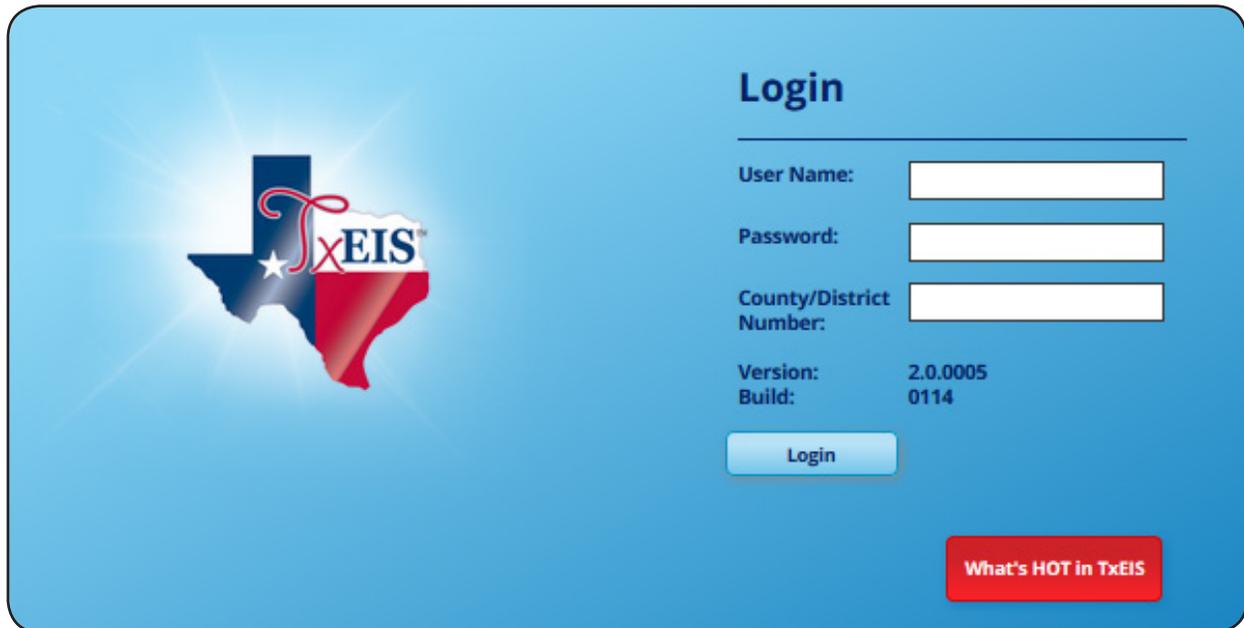
Login Page

BEFORE YOU BEGIN: Click **What's HOT in TxEIS** to access the *What's Hot in TxEIS* newsletter which is updated with each software release. Clicking the button opens the latest web-based newsletter on the txeis.net website.

1. In the **User Name** field, type the user ID or name provided by the district.

2. In the **Password** field, type your password. The text is displayed as black dots for privacy.

3. In the **County/District Number** field, type the six-digit county-district number.

4. The **Version Build** displays the current software version and build number.

5. Click **Login**. The Application Directory is displayed.

Change Password

From the Application Directory, in the top-right corner, click **Change Password** to access the Change Password page where you can update your password as needed.

The Change Password page opens. Your user ID is displayed in the **User ID** field and cannot be changed.

1. In the **Old Password** field, type the current password.

2. In the **New Password** and **Confirm Password** fields, type and re-type a new password that conforms to password requirements as specified by the LEA.

3. Click **Save**. Or, click **Cancel** to close the page without changing your password.

   The Change Password page closes, and you return to the Application Directory.

Exit and Logout

Before you can log out of TxEIS, you must exit any applications you have opened. In the top-right corner of each application, click **Exit Application**.

Once you have exited all applications, the Application Directory page is displayed. From the top-right corner of the Application Directory, click **Logout**.

The Logout page is displayed. Click **Back to Login** to return to the Login page.
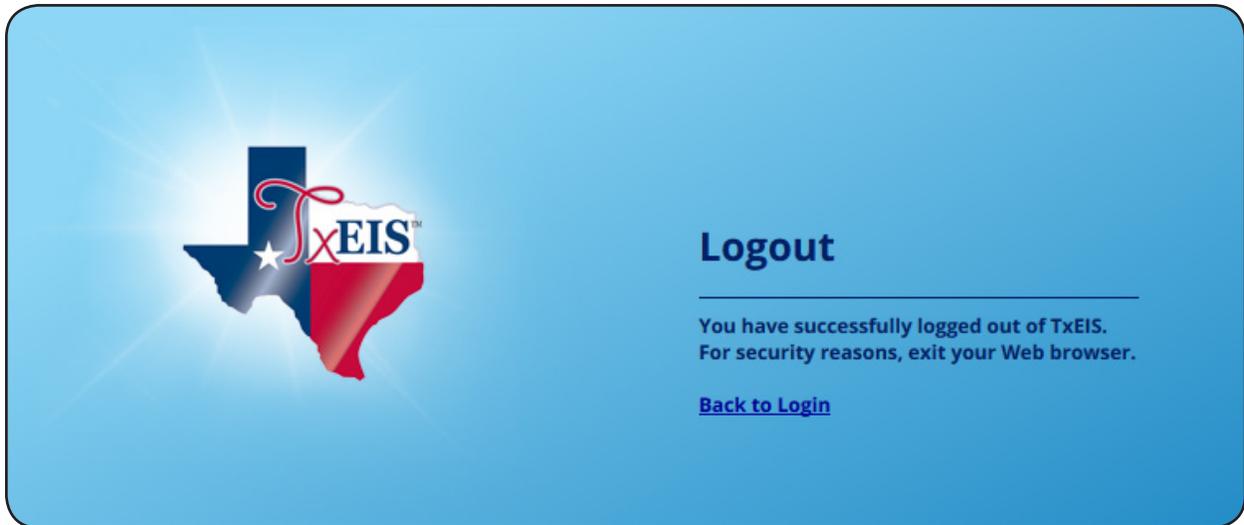
It is important to exit and logout properly to ensure that the software functions properly.

NAVIGATION

Once you successfully log on to TxEIS, the Application Directory is displayed, giving you access to TxEIS navigation tools and features.

Application Directory

The Application Directory displays links to all TxEIS applications. All applications are displayed, including applications you may not have access to. To access a Student application, click the application link under **Student** (e.g., Attendance).

My Applications

Under **My Applications**, on the left side of the page, only the applications to which you have rights are listed. You can access a Student application by clicking the application link under **My Applications**.

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

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

Click **Exit** to return to the Application Directory page.

Menu

When you click an application link from the Application Directory, the application landing page opens, which provides access to the application menu.
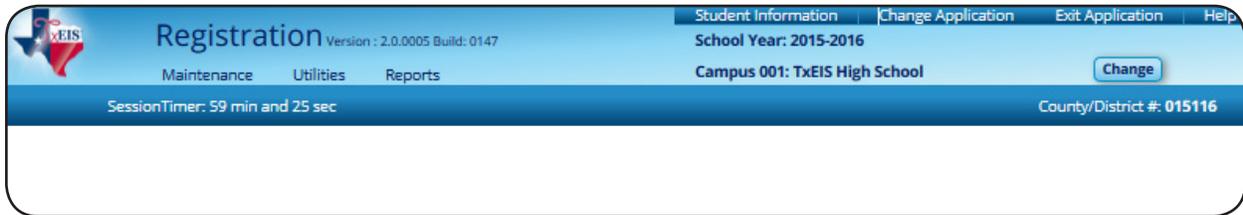
Click a menu to display the submenus.
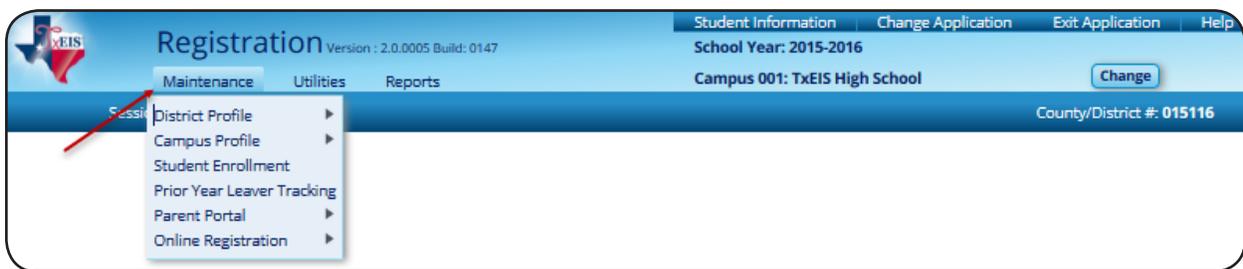
If an arrow is displayed to the right of the submenu name, another submenu exists. The submenu appears when you hover over the submenu.
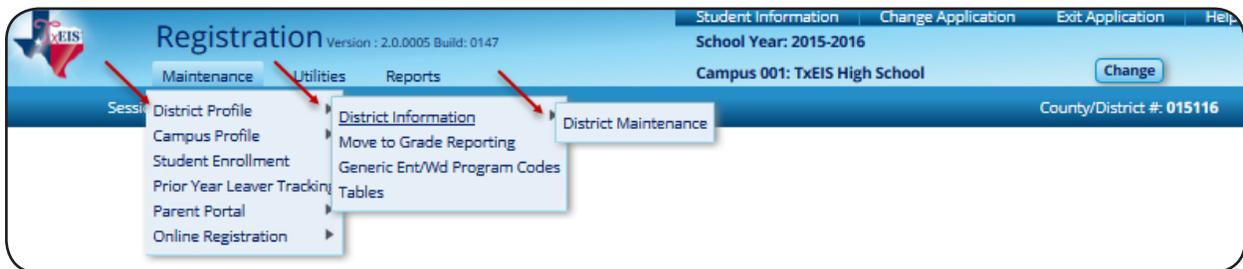
When the page you want to access is visible, click the page name to open the page.
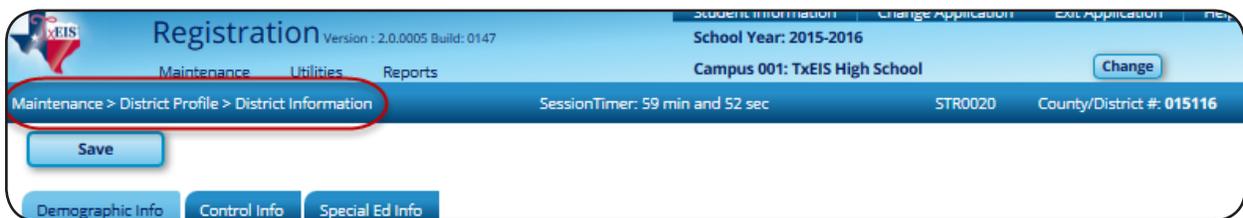
The breadcrumb below the menu displays the menu path to the selected page.

Some pages have multiple tabs; other pages may have no tabs.

Software Version

From the Application Directory, click **Application Directory** to view a list of the current versions and build numbers for each application you have access to. Click **OK** to close the list.

Additionally, in each application, the current version is displayed next to the application name.

Change Application

If you have opened an application and want to open a different application without exiting the first one, hover over **Change Application** in the top right corner of the application. A drop-down list displays the applications you have access to.
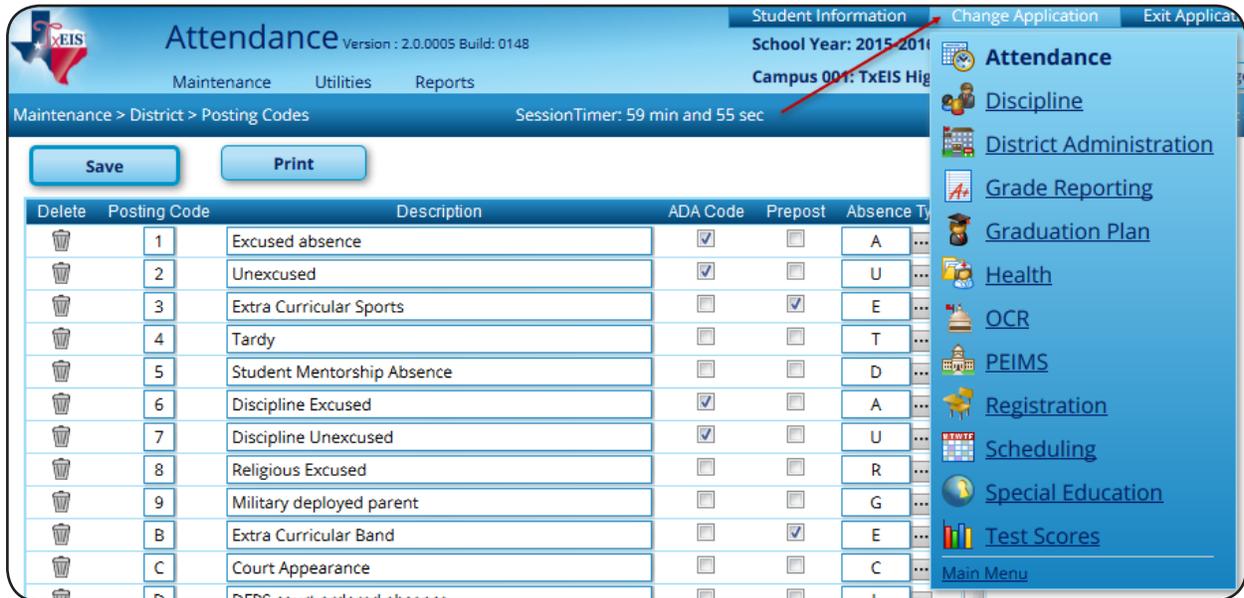
Click an application link. The application landing page opens in a new tab or window, depending on your browser settings. The original application remains open in your browser.

Note that you can change your browser settings to allow each application to open in a separate browser tab, which simplifies navigation when are working in multiple applications.
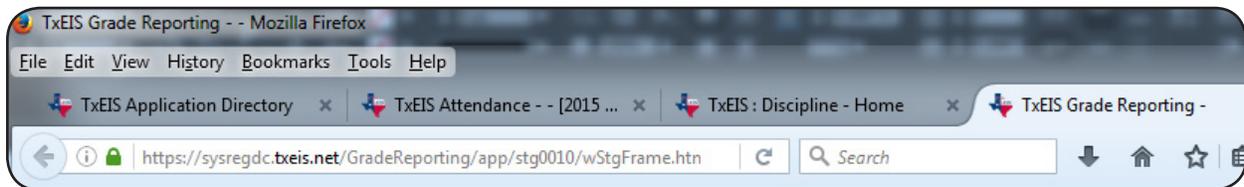
NOTE:

It is strongly recommended that you do not have multiple pages within the same application open at the same time.

Linked Pages for Student Maintenance

On a specific set of student maintenance pages, once you have retrieved a student, the **Change Application** drop-down list includes links to specific pages within the applications to which you have access, allowing you to easily access a student's data in other applications without having to re-retrieve the student in each application.

When you click a page link in the list, the application and page change, but the same student is retrieved on the new page.

The following pages are linked, but only pages you have access to will be listed:

- Attendance > Maintenance > Student > Student Inquiry
- Attendance > Maintenance > Student > Student Posting > By Individual
- Discipline > Maintenance > Student > Inquiry
- Grade Reporting > Maintenance > Student > Individual Maint
- Graduation Plan > Maintenance > Student > Individual Maintenance (current year only)
- Registration > Maintenance > Student Enrollment
- Special Education > Maintenance > Student Sp Ed Data > Current Year
- Test Scores > Maintenance > Individual Maintenance

Change School Year or Campus

The selected **School Year** and **Campus** fields are displayed in the top-right corner of each application page.

1. Click **Change** to change the school year and/or campus. Both fields are enabled.
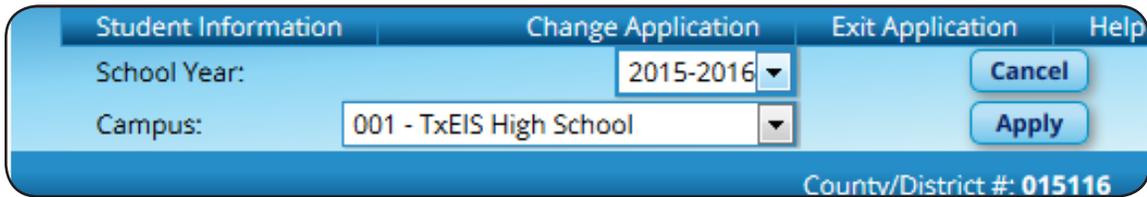
2. In the **School Year** and/or **Campus** fields, select the school year or campus you want to access.

3. Click **Apply**. Or, click **Cancel** to return to the previous page without making changes.

Session Timer

Each application page displays a session timer that counts down to 00 minutes. The session timer settings are managed in District Administration on the Options > Session Timers page and will be between 20 and 240 minutes.

■ Every time you open a page, the timer resets.
■ Every time you perform an action on a page, such as clicking a button or tab, the timer resets.

■ When there are two minutes remaining in the timer countdown, a warning message is displayed.

Session will time out for Discipline in 2 minutes. Click OK to extend the session.
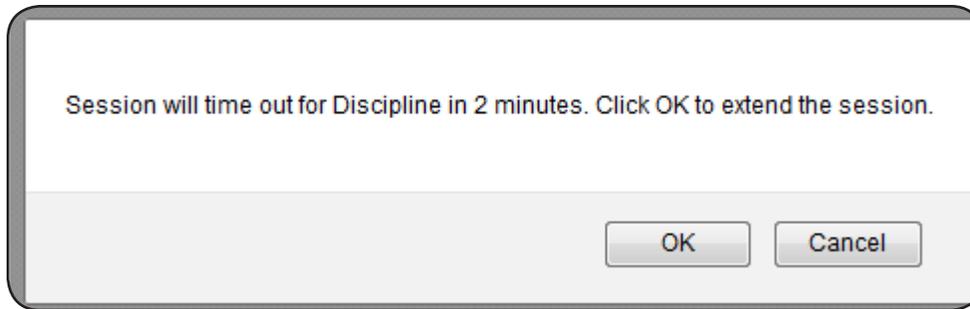
OK   Cancel

Click **OK** to reset the session timer, or click **Cancel** to continue the existing session. If you do not click either, the existing session will continue counting down.

Your session has timed out for Discipline. Changes to the current page can no longer be saved.

OK
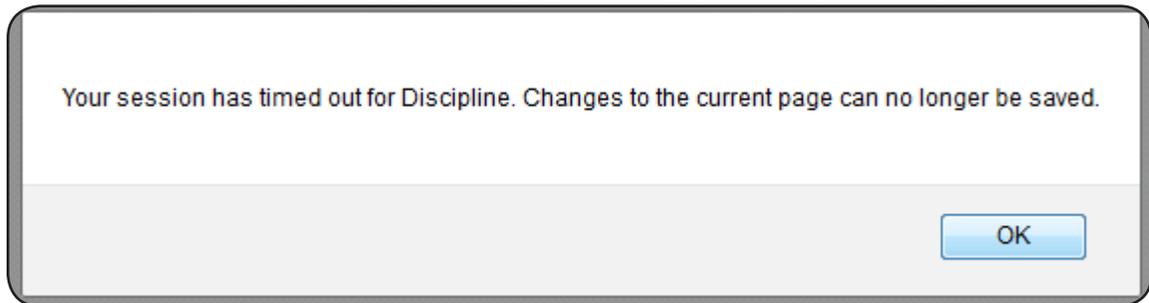
- After the two-minute warning, if you do not click **OK** or **Cancel**, the application session automatically times out two minutes later due to inactivity. To return to the application and start a new session, you can click **Change Application** or **Exit Application**.

NOTE:

The session timers are separate for each application, so you may receive a session timeout message in one application while you are working in another application.

Online Help

From each page in each application, online Help is available. Click **Help** in the top-right corner to view Help for the current page.
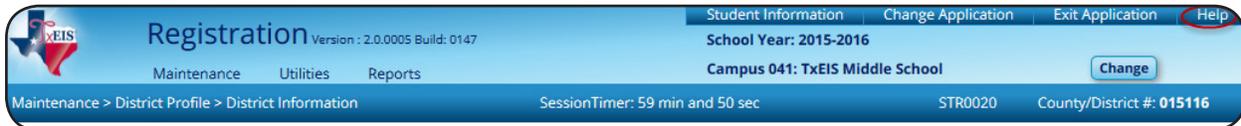
The Help page opens in a new window.
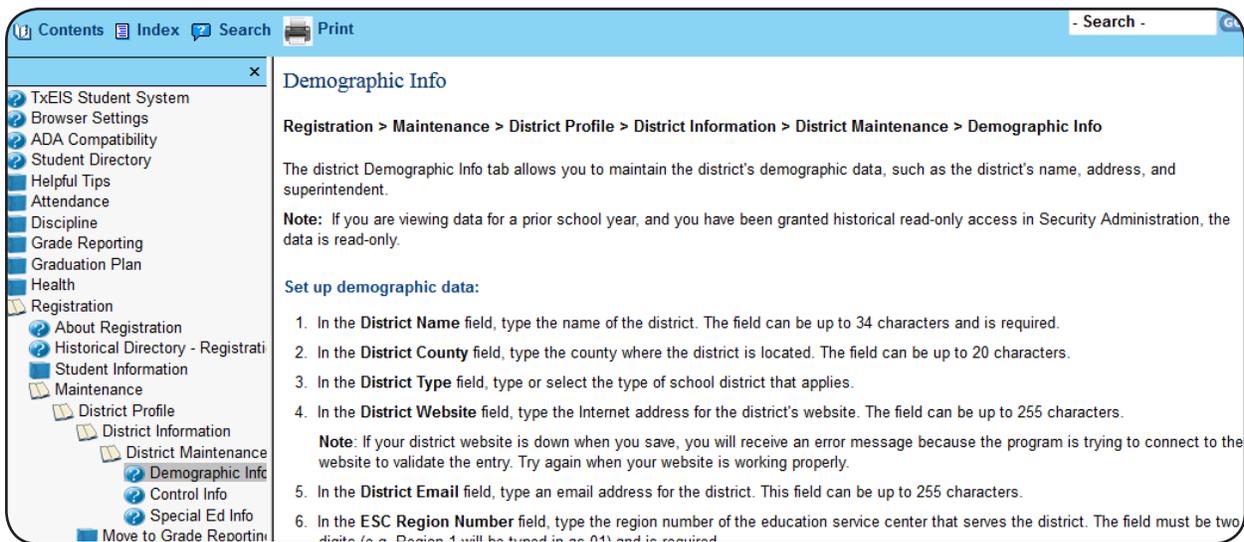
- The right frame displays the Help topic for the page you were viewing when you clicked **Help**.
- The left frame provides a table of contents for navigation. All Help topics for the TxEIS Student system can be accessed from the Contents frame, as well as system-level information.
  - The Help topics are arranged by menu and submenu.
  - Click █ to expand the list of Help topics under a menu.
  - Click **Index** to view a searchable list of all Help topics sorted alphabetically.
  - Click **Search** to perform a keyword search within Help. Note that the search feature is rudimentary and cannot retrieve multiple words as a phrase.
  - Click **Print** to print the Help topic displayed.
- Click ✕ to close the Help window.

Printing

If you print data using an option in the browser menu or browser toolbar, only the page you are currently viewing will print, regardless of your settings in the Windows Print Options dialog box. Any TxEIS pages, tabs, and tables that are available in a printable format will have a **Print** button on the page allowing you to generate the data in a printable format.

Back Button

Normally, when using an internet browser, you can click the browser 'back' button or arrow to return to the last page viewed. Since TxEIS is a secure system, the use of the "back" button or arrow is not allowed.

RETRIEVE AND MAINTAIN DATA

Autosuggest

The **Student** field autosuggest feature, which is available on most pages where you retrieve a student record, allows you to search for a specific student by typing some or all characters in the student's name or student ID. As you begin typing in the field, a drop-down list of students is displayed according to the characters you have typed. The more characters you type, the shorter the list.

The drop-down list displays student last name, first name, middle name, grade level, and WD if the student is withdrawn or a No Show.

In the **Student** field, begin typing characters in the student's last name. Students whose last name begins with the characters you typed are listed in the drop down, and you can scroll through the list and select a student.

You can also type characters in the student's ID. Student's whose IDs begin with the characters you have typed are listed.

Additionally, you can type the first character of a student's last name, comma, and the first character of the student's first name.

The **Texas Unique Stu ID** field autosuggest feature is also available on pages where student data is retrieved. Begin typing characters in the student's ten-digit state assigned ID number, and students are listed whose IDs start with the characters you have typed.

Student Directory

The Student Directory allows you to search for a student and retrieve the student's record to the page from which you accessed the directory. You can search for a student by last and/or first name. Other options allow you to narrow the search further.

On pages where student data is retrieved, you can click **Directory** to open the Student Directory.
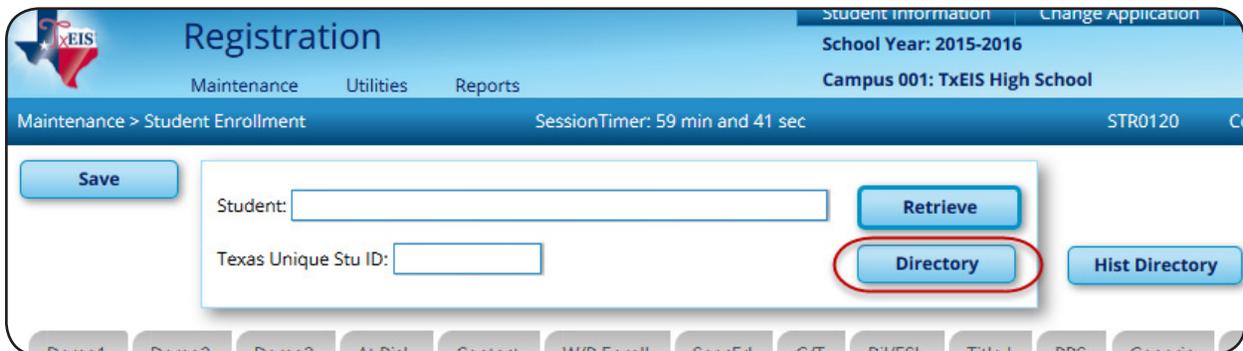
The Student Directory opens in a pop-up window.
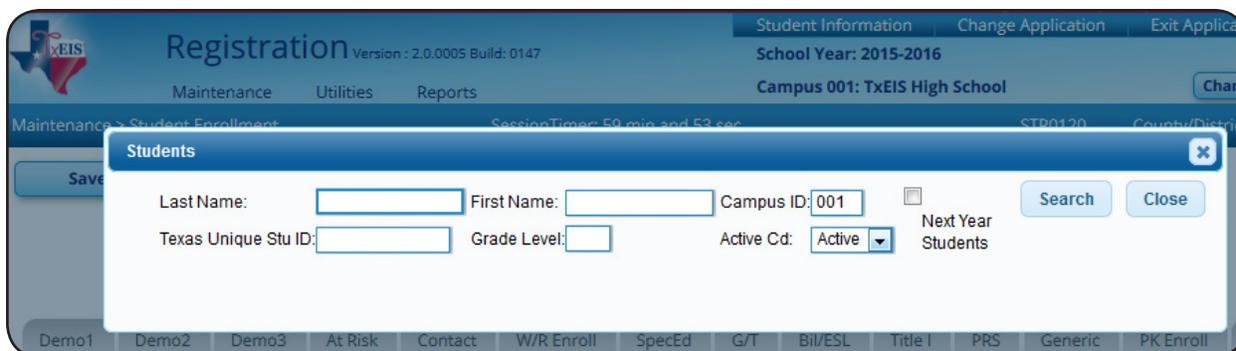
1. You can search for a student by last and/or first name. Other options allow you to narrow the search further. Enter data in any or all of the following fields:

   ● In the **Last Name** field, type all or part of the student's last name. For example, you can type sm to find all students whose last name begins with Sm.

   ● In the **First Name** field, type all or part of the student's first name. For example, you can type jo to find all students whose first name begins with Jo.

   ● In the **Campus ID** field, type the three-digit campus ID to filter the search results for a specific campus. Leave blank to search all campuses to which you have access.

   ● In the T**exas Unique Stu ID** field, type all or part of the student's Texas Unique State ID. For example, you can type 55 to find all students whose ID contains 55.

   ● In the **Grade Level** field, type a grade level to narrow the search to one grade level. Leave blank to search all grade levels.

   ● In the **Active Cd** field, select *Active*, *Inactive*, or *All* to indicate if you want to limit the search results to active students only, inactive students only, or all students.

   Depending on the application, there may be additional fields allowing you to filter the search results for specific students.

   ● For example, in Registration on the Maintenance > Student Maintenance tabs, the **Next Year Students** field allows you the option to retrieve students with record status 5 (i.e., not currently enrolled in this district, will attend next year) in the search results. When you select a record-status-code 5 student to be retrieved, a warning message is displayed to inform you that the student is not enrolled in the current year.

2. Click **Search**. The students who meet the criteria entered are displayed.

If more students are retrieved than can be displayed on one page, you can page through the list, which is described later in this guide.

3. When you locate the student you want to retrieve, click the student ID. The directory closes, and the student's information is displayed on the page from which you accessed the directory.

4. Click **Cancel** or **Close** to return to the previous page without selecting a student.

Student Photo

If set up by the LEA, student photos are displayed on all maintenance pages on which individual student records are retrieved. The photo is displayed once you click **Retrieve**.
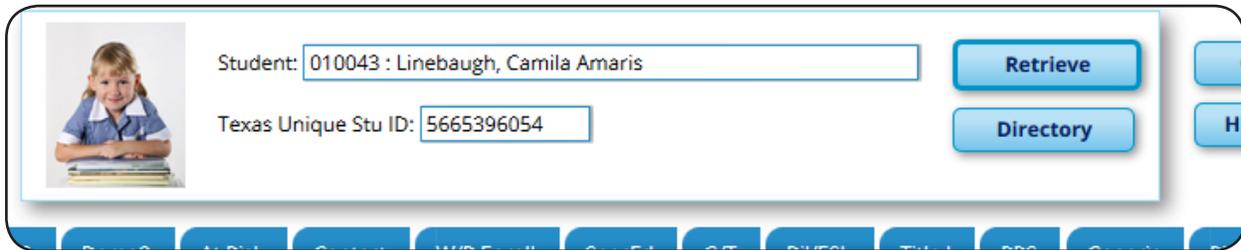
If a photo is not available, a silhouette image is displayed in place of the student photo.
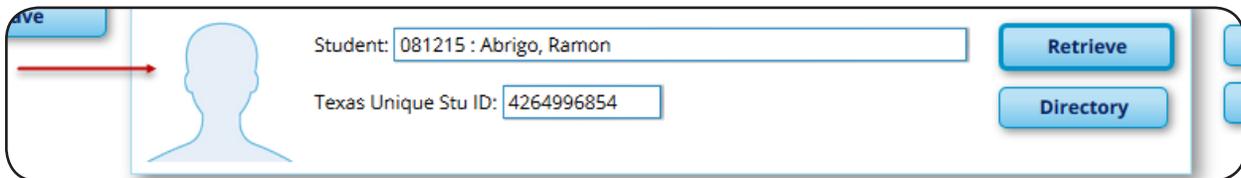
Change Student Photo

From the Registration > Maintenance > Student Enrollment page, you can upload a different photo for the student if an image file is available on your local PC.

1. Hover over the existing photo or silhouette, and the word "Change" appears on the image.
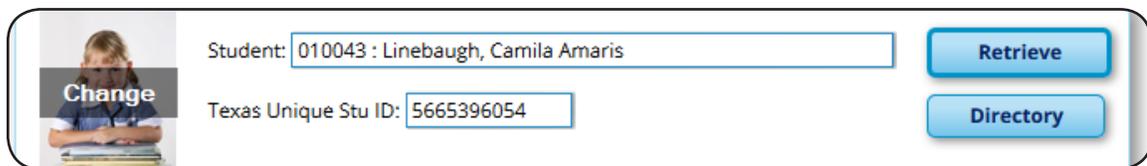
2. Click **Change**. The Change Student Photo window opens.

3. Click **Browse**. Locate and select an alternate photo on your local PC. The new image is displayed.

4. Click **Save**. The new image now appears on the student maintenance pages.
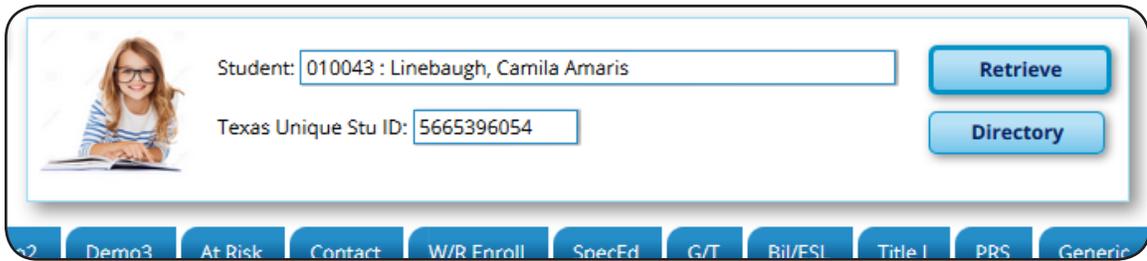
The initial student photo image files must be copied to a folder in a TxEIS directory. (Note that directory will vary by server.) Within the TxEIS directory, place files in a Pictures folder, and in a district folder (e.g., TxEIS Directory\Pictures*cccddd*\007036.jpg). If a Pictures folder does not exist, or if the district folder does not exist, photos will not be enabled on any pages. See the TxEIS Getting Started guide for more information.

Student Information

The Student Information report provides demographic information, contact information, discipline records, attendance records, special program enrollment information, schedules and health information (Medical Alert) from the Attendance, Discipline, Grade Reporting, Health, and Registration applications depending on your security rights.

From any of these applications, click **Student Information** in the top-right corner to view the report.

If a student was already retrieved, data for the selected student is displayed. Otherwise, the page is blank and you can use the fields at the top of the report page to retrieve a student.

The **School Year** field displays the year for which you are logged on. You can select a different year.

Ellipsis Lookups and Directories

Throughout TxEIS Student applications, some fields have a small square ellipsis icon allowing you to search for and retrieve a value for the corresponding field.

When you click the icon, a lookup or directory opens depending on the field.

Lookup

A lookup (i.e., list) provides one data element, such as a code/description. A search field is provided.
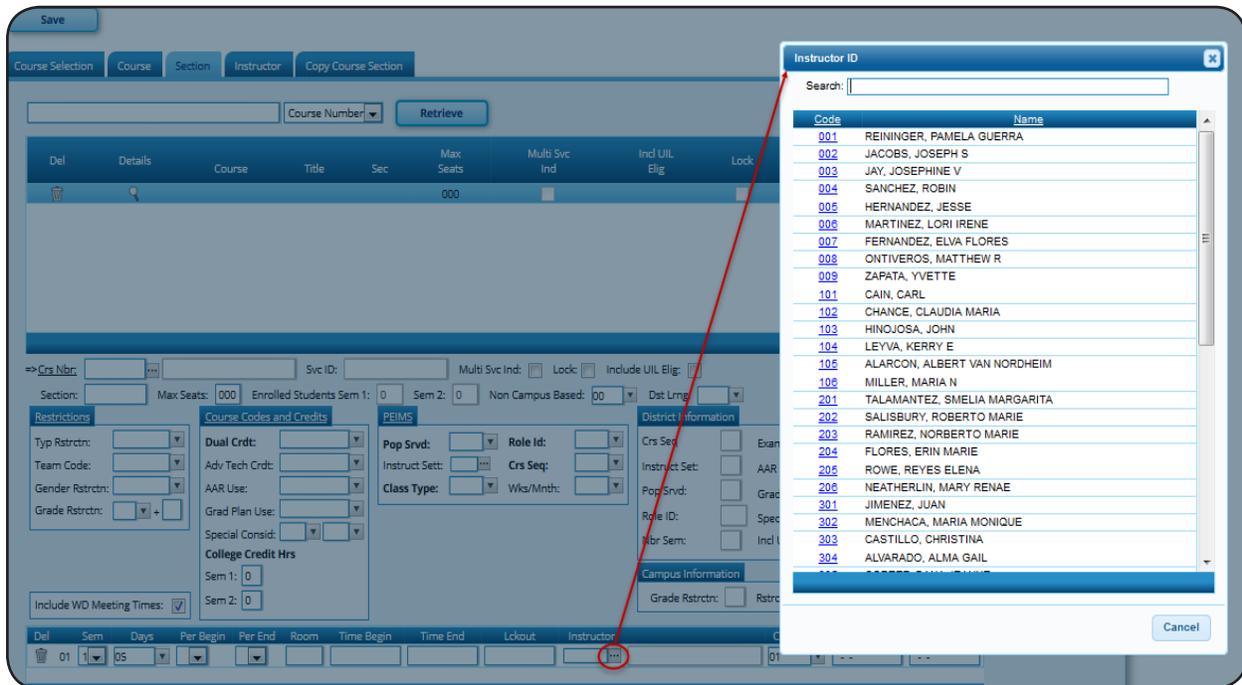
1. To search for a specific value, begin typing the description, code, or ID in the **Search** field. The list is automatically filtered to display the records where the description, code, or ID *contains* the characters you have typed.

2. Click the link for the value you want to select. The lookup closes, and the field is populated with the selected value.

Directory

A directory returns multiple fields of information and usually has multiple search fields. See the Student Directory section of this guide for an explanation of directory usage.
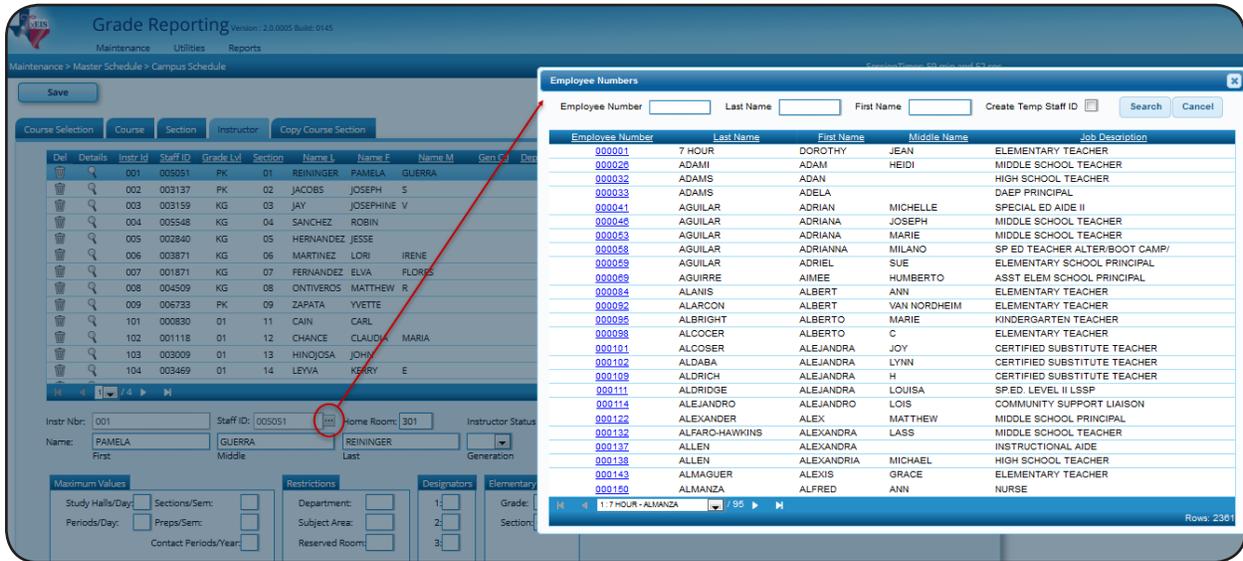
Column Sorting

In many grids, you can sort the displayed data in order to more easily locate a specific record. When a column heading is underlined, the data in the grid can be sorted by that column.
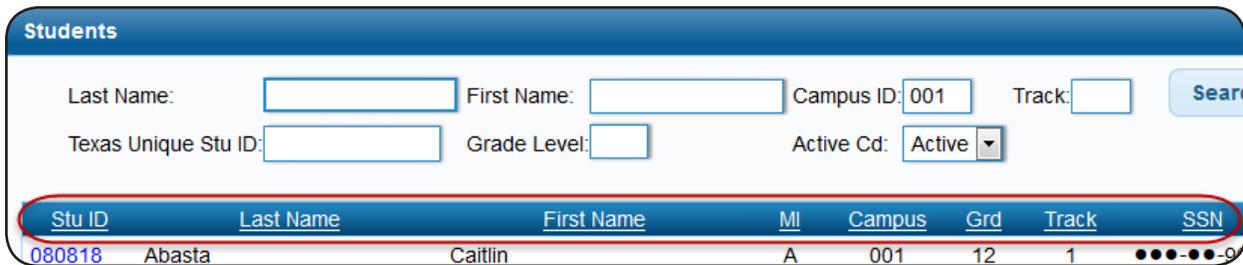
Click the column to sort the data in ascending order.
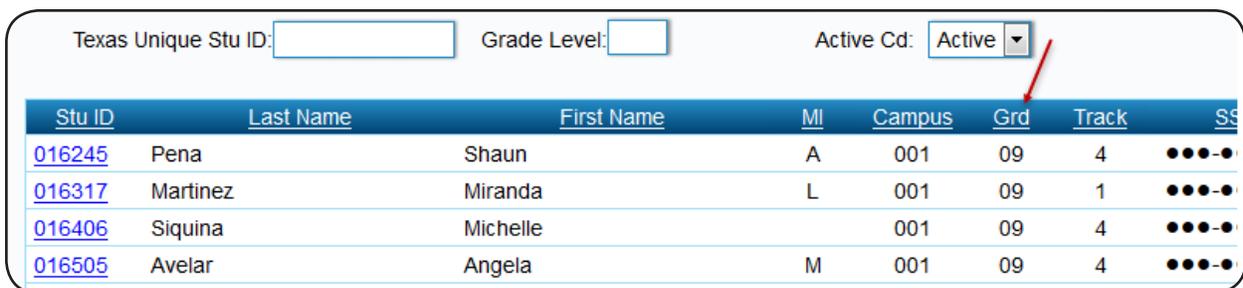
Click the column again to sort the data in descending order.

Pagination

Some grids and pages display a set number of rows of data. If the available data exceeds the number of rows that can be displayed on one page, pagination arrows will be available at the bottom of the grid or page allowing you to go to the previous or next page, or to the first or last page.

Pagination arrows are also displayed at the top of multi-page reports.

- Click ◁ 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.

Some pages also provide a drop-down page list allowing you to jump to a specific page. For example, the Student Directory provides a drop-down list showing the student name ranges on each page.
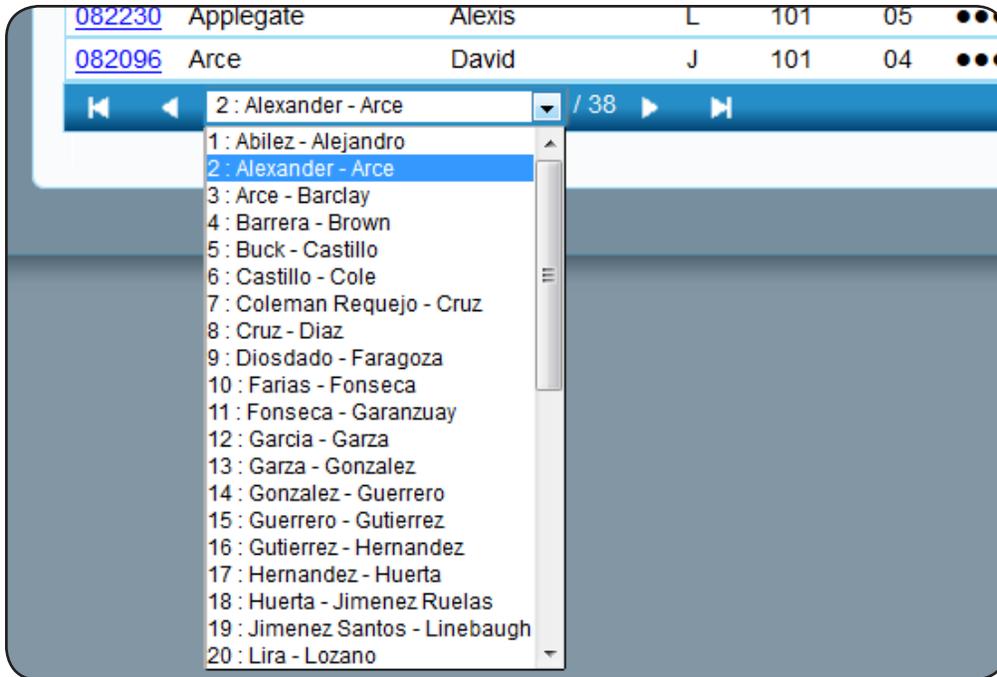
Adding Records

+Add Button

On pages with grids, the **+Add** button is used to add rows to the grid. Click **+Add**, and a blank row is added to the grid, usually at the bottom, allowing you to add a new row of data. In some cases, clicking **+Add** opens a pop-up window in which you can enter data.

Add Button

On pages without a grid, an **Add** or **New** button (or similarly named button) is used to add a new record. Click **Add**, and the page is cleared of data allowing you to add and save a new record.

Delete Records

On pages with grids, a trash can icon 🗑 is displayed next to any row that can be deleted.

1. Click the icon, and the row is shaded red to indicate that it will be deleted when the record is saved.

You can select multiple rows to be deleted at the same time.
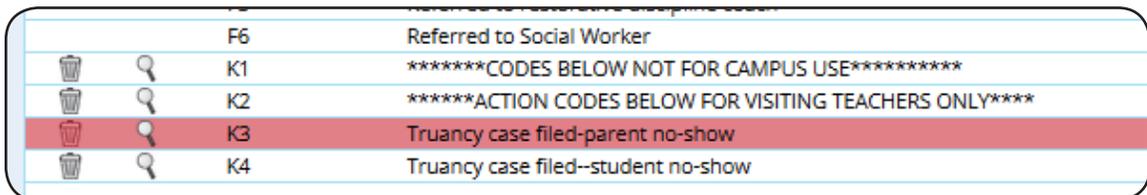
		F6	Referred to Social Worker
🗑	🔍	K1	*******CODES BELOW NOT FOR CAMPUS USE**********
🗑	🔍	K2	******ACTION CODES BELOW FOR VISITING TEACHERS ONLY****
🗑	🔍	K3	Truancy case filed-parent no-show
🗑	🔍	K4	Truancy case filed--student no-show

2. Click **Save**.

    ● On most pages, a message is displayed asking you to confirm that you want to delete the row.
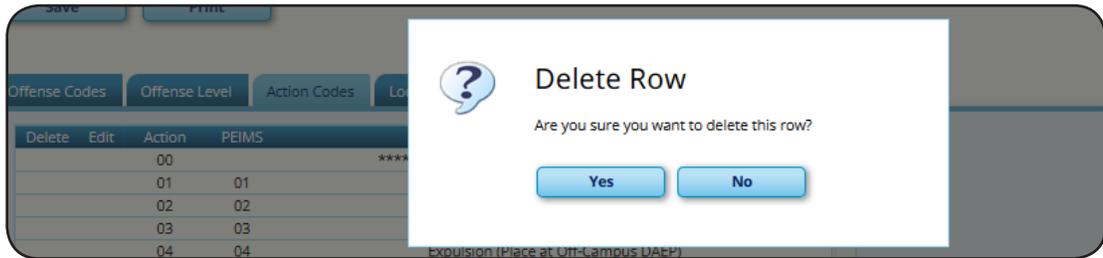
    Click **Yes** to continue. The selected rows are deleted. Or, click **No** to cancel the action.

    ● If restrictions exist, a message is displayed in red at the top of the page.
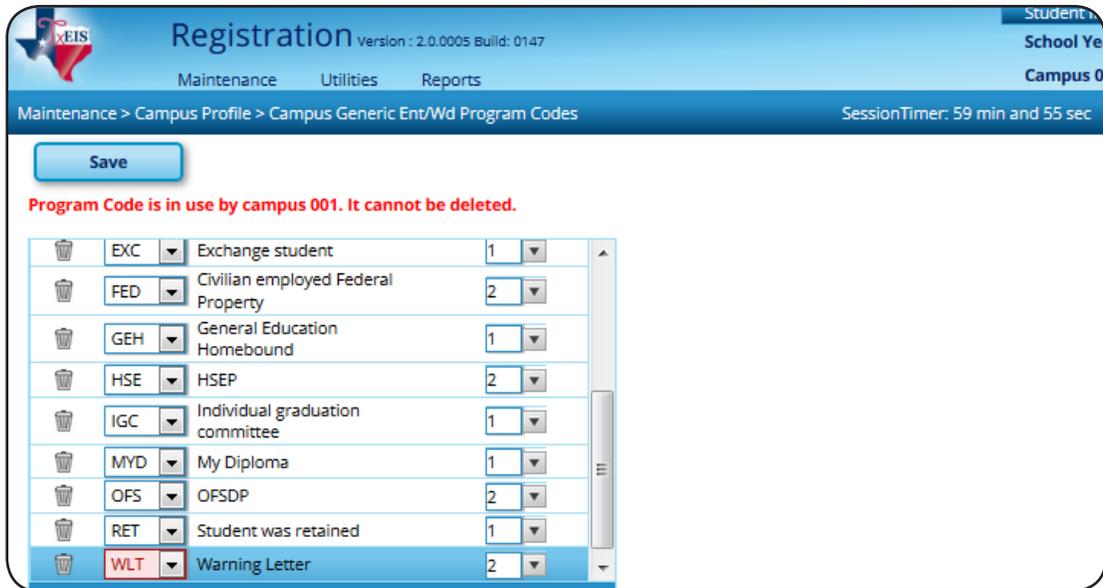
NOTE:

On most pages, you can save edits and delete records in the same step (i.e., the changes are all committed when the record is saved).

Delete Button

On pages without a grid, a **Delete** button (or similarly named button) is used to delete the displayed record.
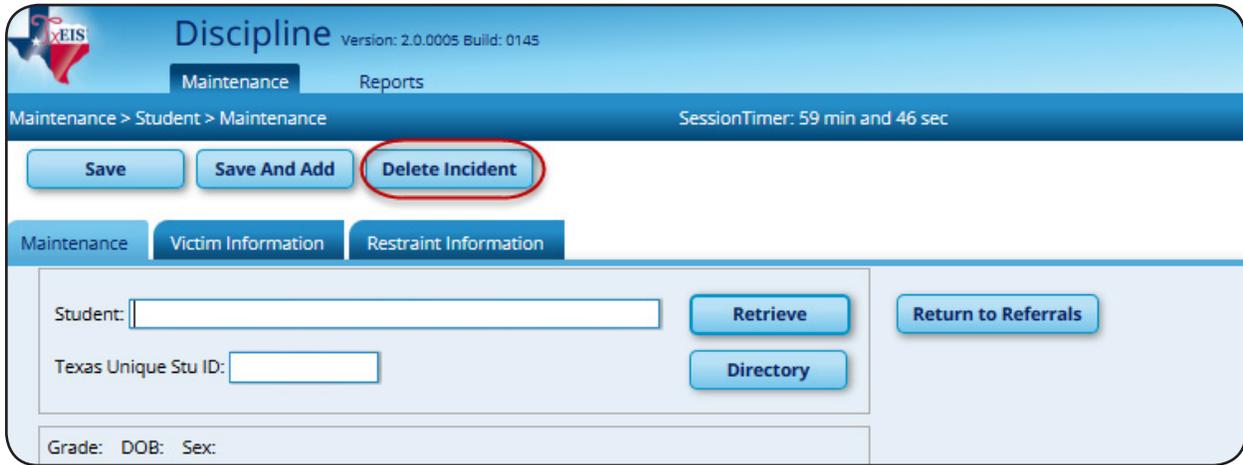
On most pages, when you click **Delete**, a message is displayed asking you to confirm that you want to delete the record.
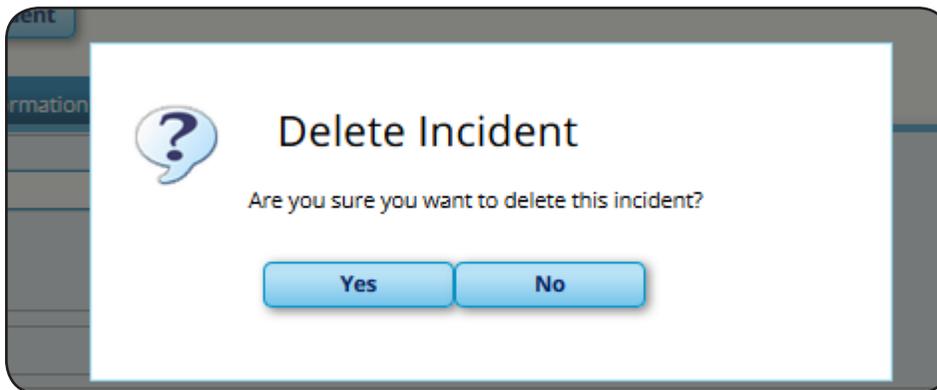
Click **Yes** to continue. The selected rows are deleted. Or, click **No** to cancel the action.

Spyglass Icon

Spyglass icons 🔍 are displayed throughout TxEIS Student when additional data exists, or when additional information can be added, for the record displayed. Click the spyglass icon to view or add data.

On some pages, clicking the icon opens a pop-up window that displays additional fields. On other pages, clicking the spyglass icon opens a new page. Elsewhere, the clicking the spyglass may display a new section of information on the same page.

Example 1:

Discipline > Maintenance > Student > Inquiry

Click the spyglass icon to go to Discipline > Maintenance > Student > Maintenance where you can add, modify, or delete the record.

Example 2:

Grade Reporting > Maintenance > Master Schedule > District Schedule

To edit a course record, click the spyglass icon. The fields in the free-form area below the grid are enabled allowing you to make changes to the grid data. Click **Save**, and the changes are displayed in the grid.

Example 3:

Discipline > Maintenance > Tables > District Level > Action Codes

Click spyglass icon to edit a user action code. A pop-up window opens allowing you to add or change data. Update the fields, click **OK**, and the window closes. Click **Save**, and the changes are displayed in the grid.

Example 4:

Health > Maintenance > Student Health > Emergency
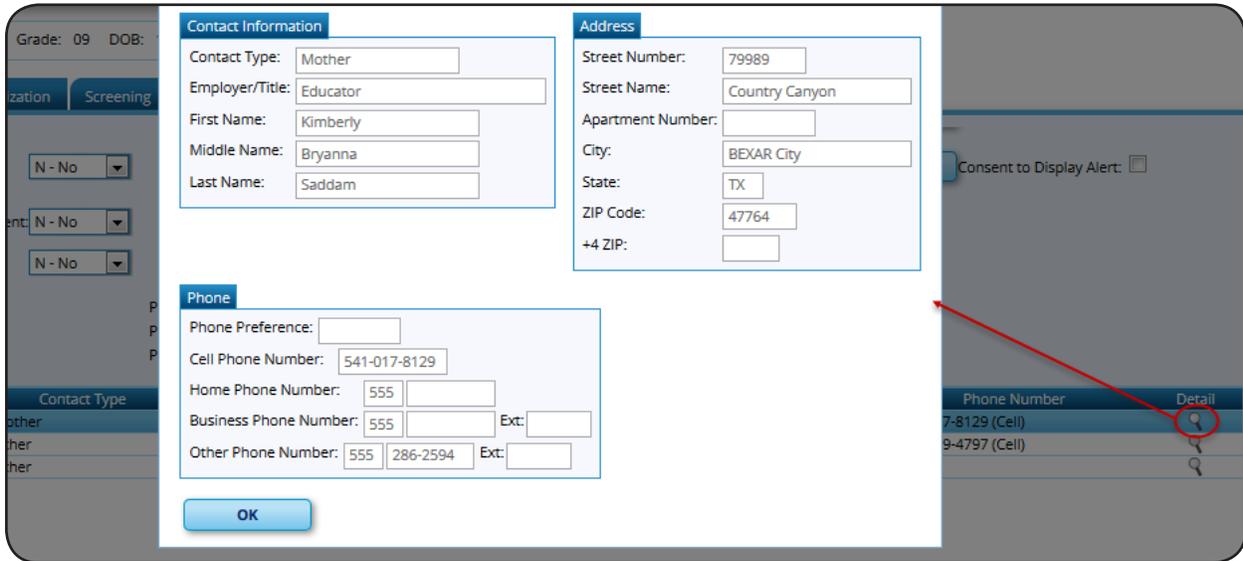
Click the spyglass icon to view the details for the student's contacts. A read-only pop-up window opens displaying the contact information.

Other variations of the spyglass icon may exist. View the online Help for an explanation of the spyglass icon usage on the page you are viewing.

Save Button

All new and changed data must be saved in order to be retained in the database. Click **Save** any time you need to keep the changes you have made.

IMPORTANT!

Save often. Unsaved data is lost when the page times out. If you get called away, or something unexpected happens, you may lose any work you have not saved.
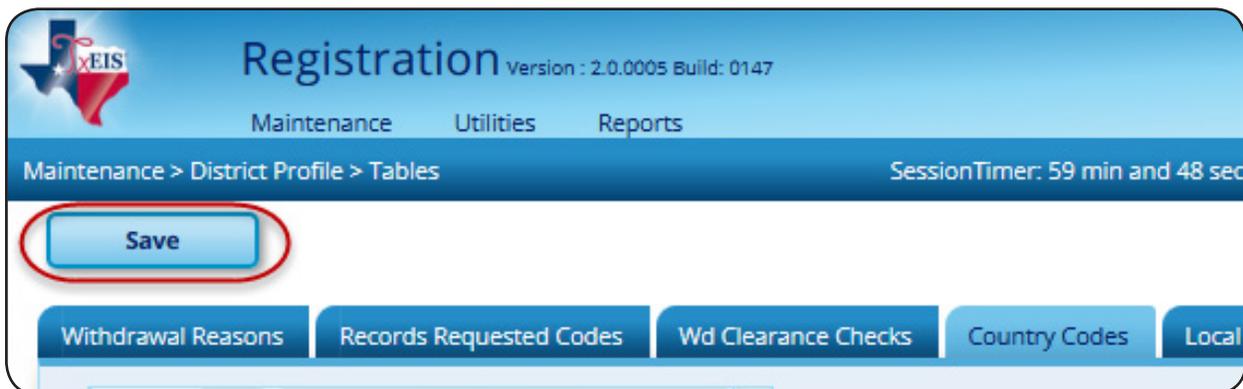
If the data was successfully saved, a "Save Successful" message is displayed below the **Save** button.

If any required data is missing, or the record cannot be saved for any reason, a red error message is displayed above the **Save** button. The field(s) with invalid data are highlighted.
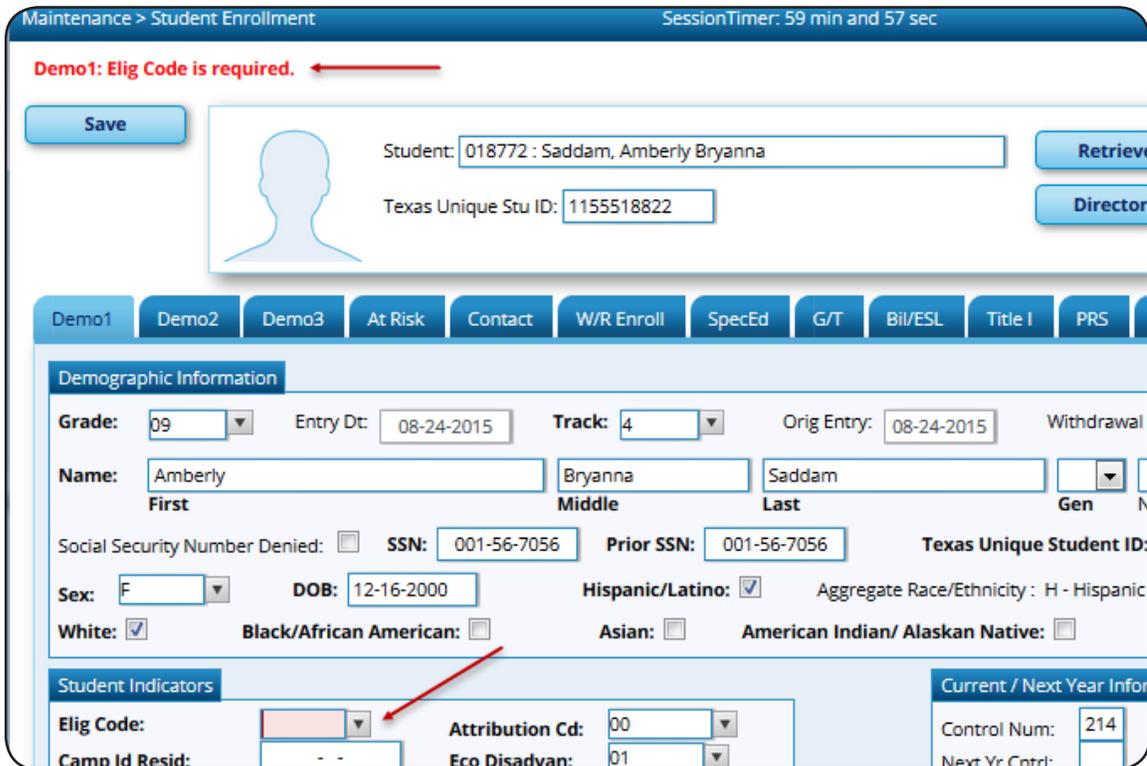
All issues must be corrected before you can successfully save the data.

HERE'S A TIP!

On maintenance pages, if the cursor is in a data field, and any data on the page has been changed, pressing ENTER saves the data or displays the appropriate error message.

If you attempt to leave a page or access another record before saving changes, a warning message is displayed prompting you to confirm the action.
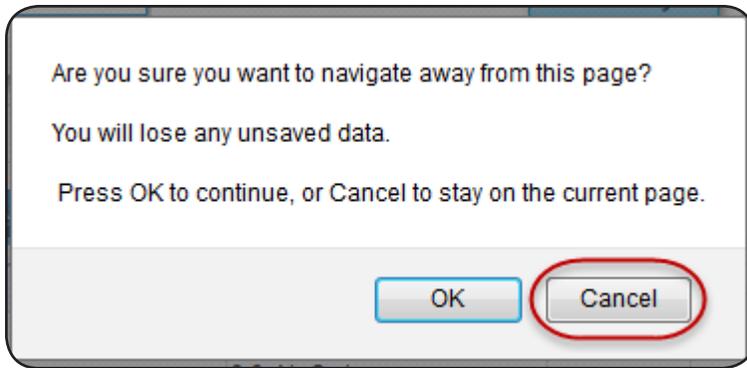
Click **Cancel** to return to the page and save any changes. Otherwise, click **OK**.

This message may also be displayed.
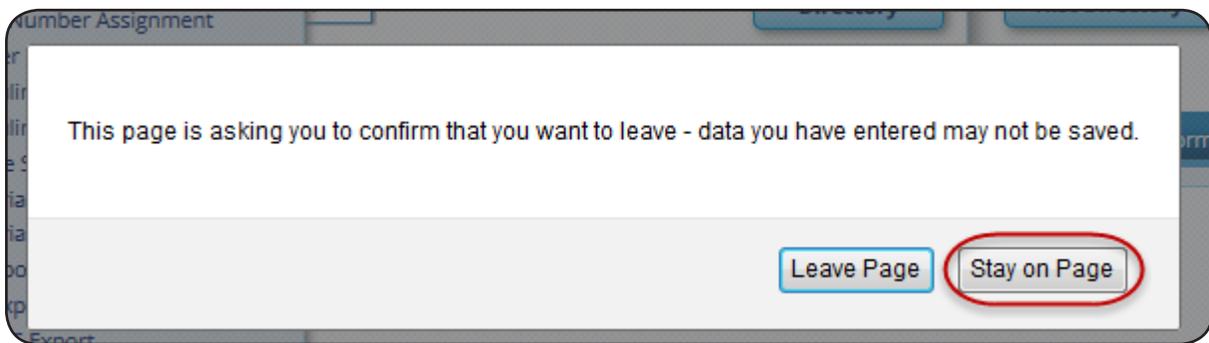
Click **Stay on Page** to return to the page and save any changes. Otherwise, click **Leave Page**.

REPORTS

Numerous reports are available in TxEIS. Reports are specific to each application, and are accessed from the Reports menu in each application. Most reports menus have submenus that group reports by type. Most applications also offer a Create Report page allowing you to create customized reports.
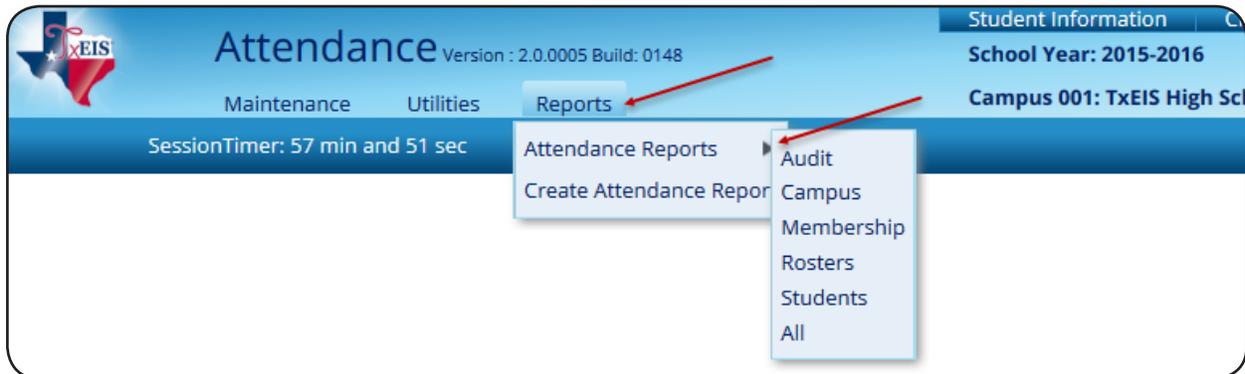
When you select a Reports submenu, a report selection page opens that lists the available forms. The breadcrumbs below the menu show the path for the selected list of reports.
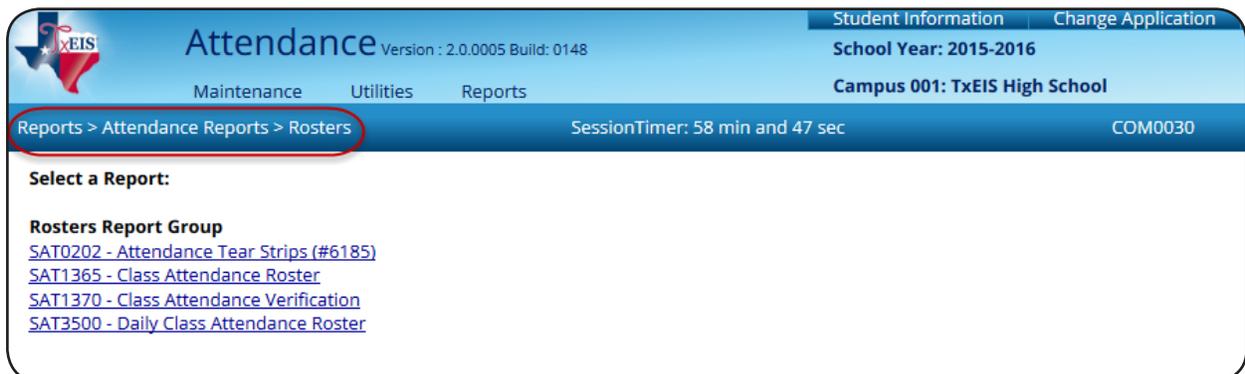
Click a report to view the report parameter page. Report parameters are the fields that allow you to specify options for running the report.

Report Parameters

- ■ The **Report ID** field displays the unique ID for the report. The first three characters generally refer to the application. For example, SAT refers to Student Attendance, SGR refers to Grade Reporting, and so on.
- ■ The **User ID** field displays the ID you used to log on to TxEIS.
- ■ Click **Clear Options** to clear all data in the **Value** fields if necessary.
- ■ For each **Parameter Description**, enter data in the **Value** field as needed. **Parameter Descriptions** in bold are required.
- ■ If the parameter has an ellipsis button [...], you can type data in the **Value** field, or you can click the button to select a value from a lookup or directory.
- ■ If the parameter has an calendar icon [icon], you can type a date in the **Value** field, or you can click the icon to select a date from a calendar.
- ■ Click **Run Preview** to generate the report.
- ■ Click **Return to Reports** to return to the list of reports.

Ellipsis Button

When you click the ellipsis button on a report parameter page, a lookup or directory opens. See the Ellipsis Lookups and Directories section of this guide.
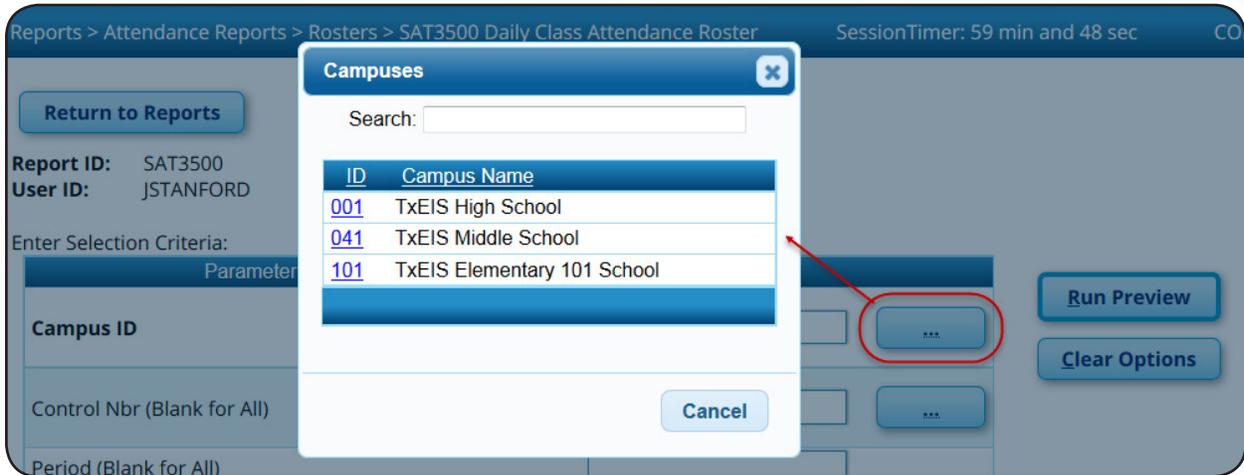
For reports, it is common for Lookups and Directories to allow you to select multiple values. When multiple values can be selected, check boxes are displayed for each value, and you can select one or more check boxes.
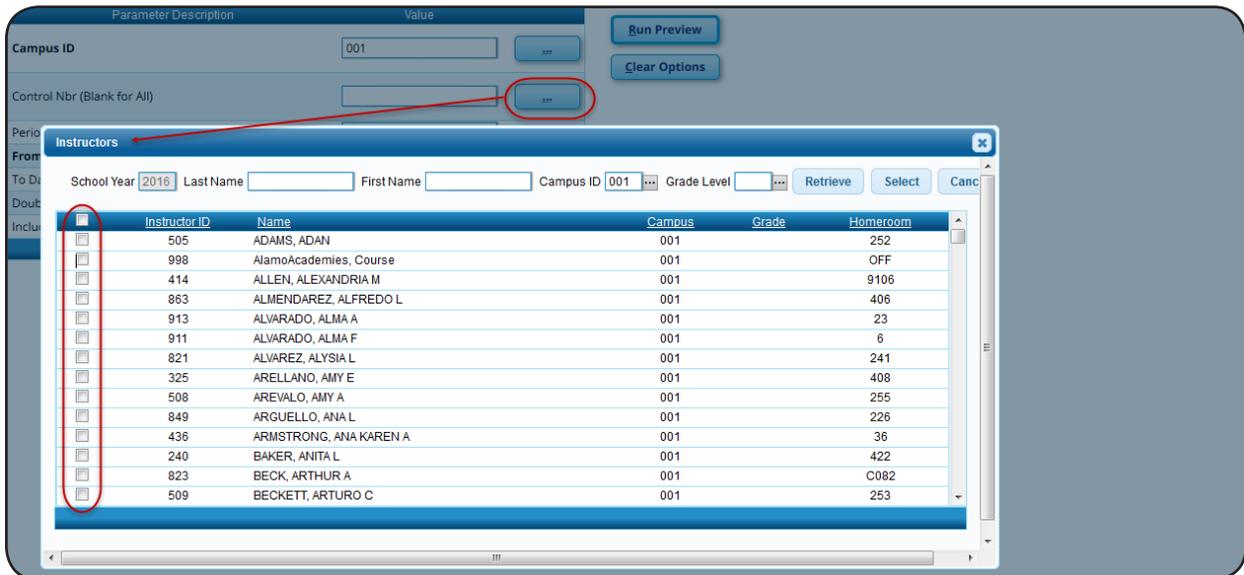
Many parameter descriptions will also state that you can leave the **Value** field blank to select all available values. For example, leave the **Campus** parameter blank to select all campuses in the district, or leave the **Grade Level** parameter blank to select all grade levels at the campus.

Calendar Icon

For date parameters, you can type the date in the MMDDYYYY format, or you can click the calendar icon to select a date from a calendar.

- Arrows on either side of the month name allow you to view previous and future months.
- When you click a date on the calendar, the calendar closes, and the **Value** field is populated with the selected date.
- If you click outside the calendar, the calendar closes with no date selected.

Report Preview

When parameter values are set, click **Run Preview**. The report preview opens allowing you to review the report.

All reports can be exported as PDF files, and you can save or print the PDF file. Many files can also be exported as CSV (spreadsheet) files.

Click the PDF or CSV icon to export the report in a PDF or spreadsheet format. Exported files are opened or saved according to your browser settings. The report data may be reformatted to accommodate the selected file type.

For example, when a report is exported to CSV format, data is displayed in columns and rows; header and footing data is not included. You can re-sort and reformat the data as needed using your spreadsheet program (e.g., Microsoft Excel).

When you click **Run Preview**, if you have entered invalid data, or if required data has not been entered, an error message is displayed at the top of the parameters page, and the affected parameters are highlighted. You must correct the issue before the report can be generated.

Reports > Attendance Reports > Students > SAT2300 Average Daily Attendance

If From Date is set, To Date should also be set.

Return to Reports

Report ID: SAT2300
User ID: JSTANFORD

Enter Selection Criteria:

Parameter Description	Value	
Campus ID (Blank for All)		...
Attendance Track (Blank for All)		
Semester (1,2,Leave Cycle,Dates Blank)		
Cycle (1,2,3,4,5,6,Leave Semester,Dates Blank)		
From Date (MMDDYYYY,Leave Semester,Cycle Blank)	06072016	
To Date (MMDDYYYY,Leave Semester,Cycle Blank)		

Run Preview

Clear Options

Click **Exit** to close the report. You will return to the list of reports from which this report was selected.

Reports > Attendance Reports > Rosters > SAT3500 Daily Class Attendance Roster   SessionTimer:

Exit

Date Run: 6/29/2016 10:46 AM   Daily Class Attendance Roster
Cnty-Dist: 015-116   TxEIS High School
Campus: 001   Sem: 1   Cyc: 1   Instr: 505 ADAMS, ADAN

User Created Reports

Most TxEIS Student applications provide the ability to create a customized application-level report for students at one campus or all campuses. Student information is pulled from the most current student record for the selected school year.

Graduation Plan and Scheduling do not offer user created reports.

1. In the **Report Title** field, type a title for the report, up to 35 characters.

2. Under **Campus Options**, select **Campus** to print information for the campus to which you are logged on, or select **All Campuses** to print information for all campuses in the district to which you have access (according to your security settings).

3. The fields are grouped by student 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., **Demographic Information**).

4. Click **Create Report** to generate the report. The report displays the selected data. Review, save, or print the report as described in the Report Preview section of this guide.

Templates

To save time and effort, you can create and reuse templates for reports that are run frequently. You can also create and use public reports, which are shared districtwide.

Create and save a new template:

1. In the **Report Template** field, type a name for the new report template.

   - Special characters are not allowed.

   - If you type a name that is already used, it will overwrite the previous template.

2. Select **Public** to make the report accessible to other users. All users in the district will see and be able to use the template.

3. In the **Report Title** field, type a name for the report, which may or may not be the same as the report template name.

4. Select the fields to be included. You can select individual fields, or you can select an entire group of fields by selecting the group name.

5. Click **Save**.

Run a report from an existing template:

1. In the **Report Template** field, 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. Public templates created by other people are not listed.

2. If you do not know the name of the report template, or if you are looking for a public report template, click **Directory** to search for a template. From the directory, you can select templates you created as well as public templates.

-   You can search for a template by the report title, report template or user ID. Type all or any part of the template name, report title, or ID.
-   Select **Public** to include both private (i.e., your templates) and public (i.e., district-wide) reports in your search results.
-   Click **Search**. Templates meeting the criteria entered are listed.
-   When you locate the report template you want to retrieve, click the report template name. The directory closes.

3. **IMPORTANT:** Once the template is selected on the Create Report page, press ENTER to populate the selections.

4. Click **Create Report** to generate the report. The report opens in a new window.

5. Review, save, or print the report as described in the Report Preview section of this guide.

NOTE:

You can save a public template as your own, or as a different public template, by saving the template with a different name. You cannot have two public templates with the same name.

Sorting and Filtering Reports

Some reports can be sorted and/or filtered once they are generated. The **Sort/Filter** button is displayed at the top of the report if the feature is available for the report. A **Reset** button will be displayed next to the **Sort/Filter** button.

Some reports may only have a **Sort** button. Other reports may only have a **Filter** button.
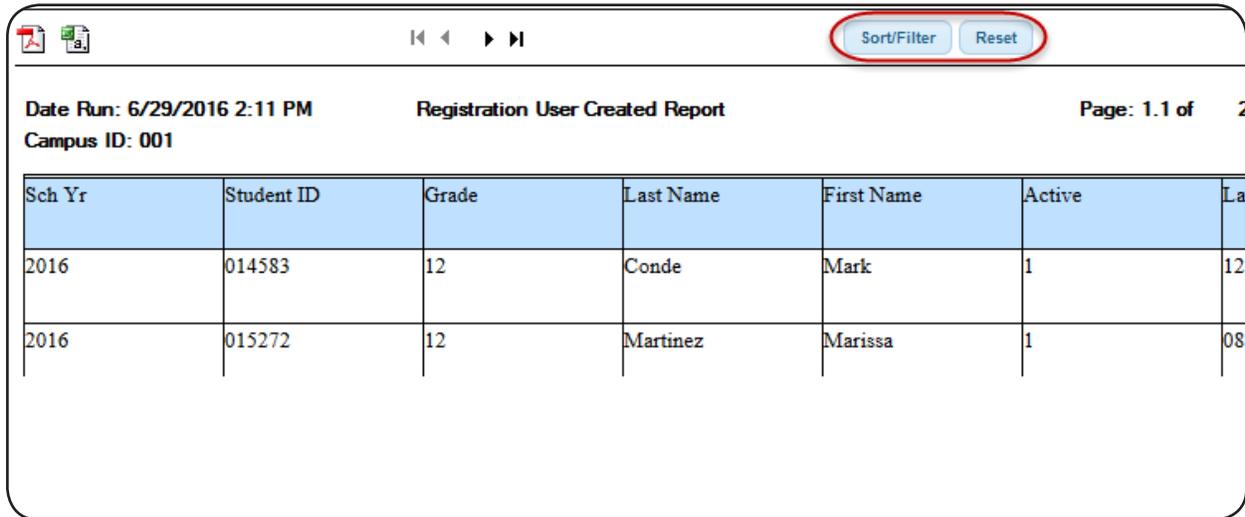
Sort

You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.

On the report window, click **Sort/Filter**. The Sort/Filter dialog box is displayed.
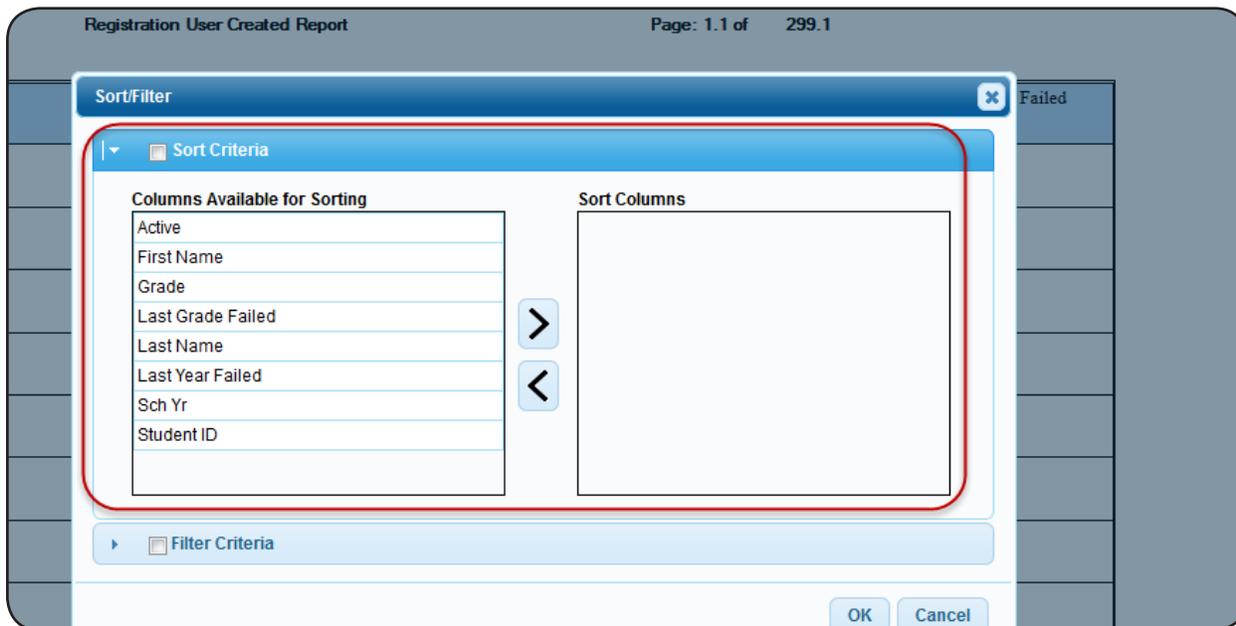
1. By default, the **Sort Criteria** section is expanded. If not, click **Sort Criteria**.

2. In the **Columns Available for Sorting** (left) list, click the field by which you want to sort, and then click >. The field moves to the **Sort Columns** (right) list.

3. Continue moving fields to the right list as needed.
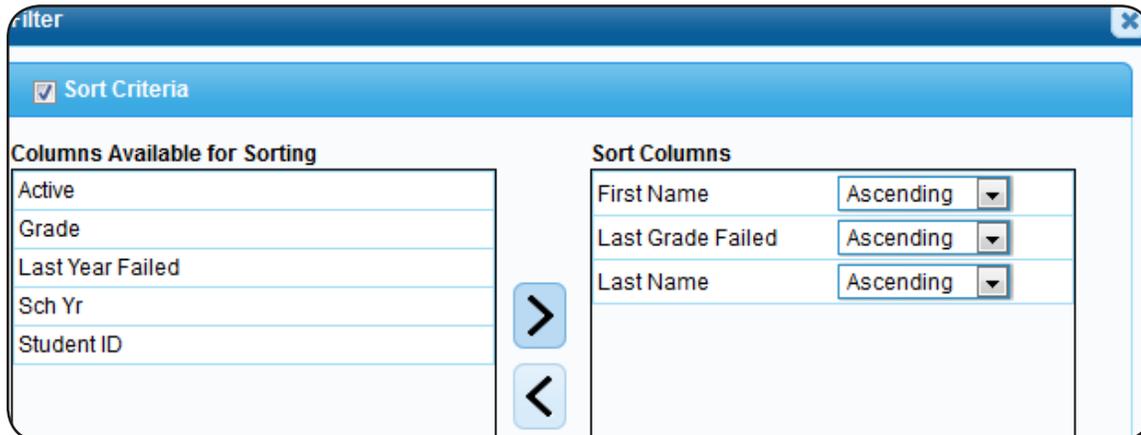
4. In the right grid, you can rearrange the fields to indicate the order in which you want the sort applied. Click a field name, and drag it up or down to a new location.

5. In the right list, for each field, indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.

6. To remove a field from the sort, select the field, and then click ◁ to move it back to the left list.

7. Click **OK** to apply the selected sort criteria to the report, or click **Cancel** to close the window without re-sorting.

8. To restore the report to the original view, click **Reset** on the report page.

Filter

By default, the **Sort Criteria** section is expanded. Click **Filter Criteria** to expand the **Filter Criteria** section.
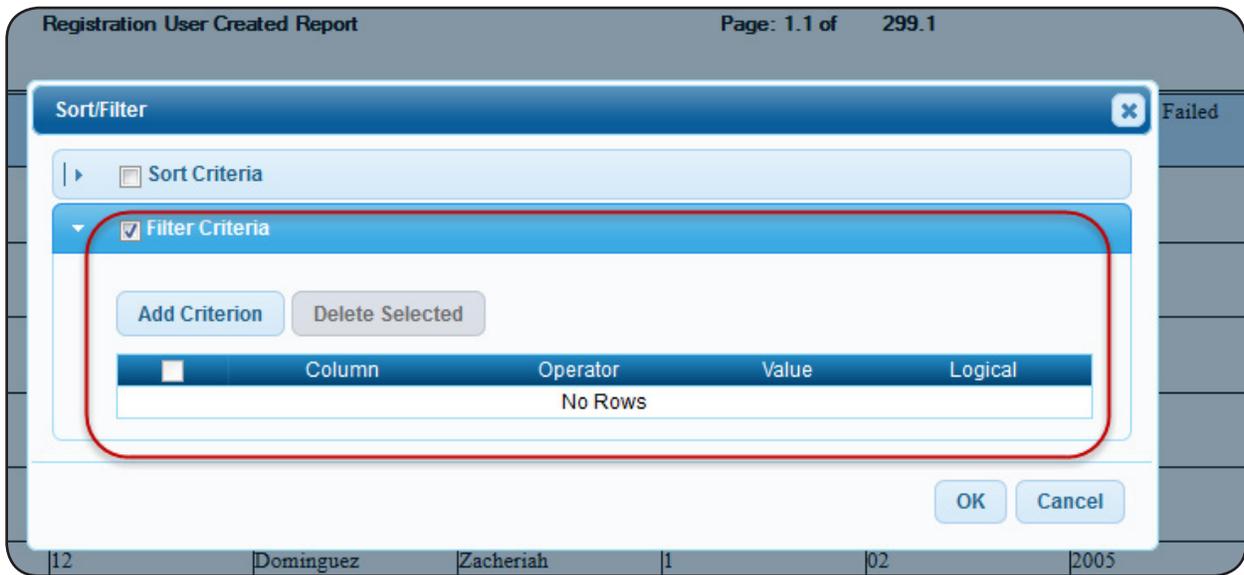
1. Click **Add Criterion** to add new filter criteria. A blank row is displayed in the grid.
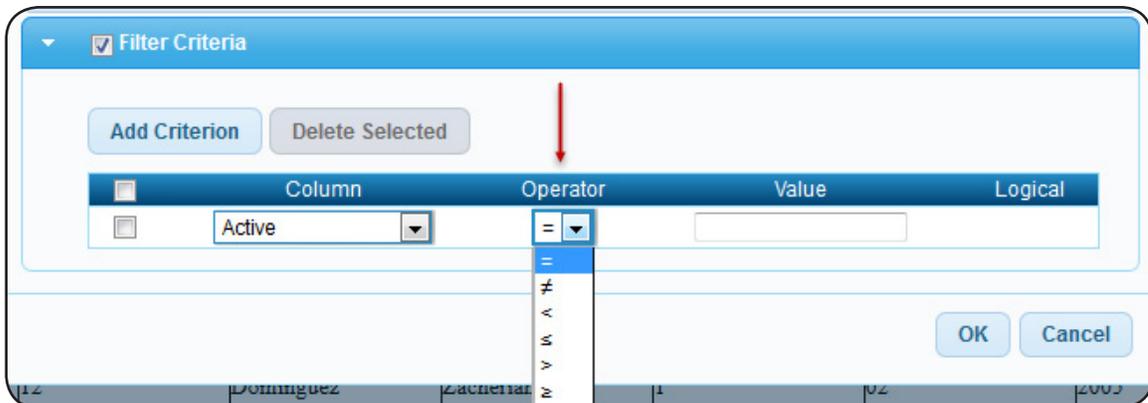
2. In the **Column** field, select a field by which to filter the data. The drop down lists the columns that appear on the report.

3. In the **Operator** field, select an operator.

   ● = - Equals
   ● ≠ - Not equals
   ● > - Greater than
   ● ≥- Greater than or equal to
   ● <- Less than
   ● ≤- Less than or equal to

4. In the **Value** field, 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.

   When filtering report data by date, you must use the following formats:

   ● If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format.
   ● If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format.
   ● If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.

5. To add another row, click **Add**, and then select the logical connector (*AND* or *OR*) in the **Logical** field. The **Logical** field does not appear until you click **Add Criterion** to add an additional row.

NOTE:

   » Using the AND operator <u>limits</u> search results, because the program looks only for records that contain both criterion.

   » Using the OR operator <u>expands</u> search results, because the program looks for records that contain either one criterion or the other, or both.

6. Continue adding rows as needed.

7. To delete a row, select the row, and then click **Delete Selected**. The row is deleted from the filter criteria.

8. Click **OK** to apply the selected filter criteria to the report, or click **Cancel** to close the dialog box without applying a filter.

9. To restore the report to the original view, click **Reset** on the report page.