

Follett Aspen™

Basic Navigation

User Guide
Version 5.2



<http://www.follettsoftware.com/school-administration-software>

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Version 5.2

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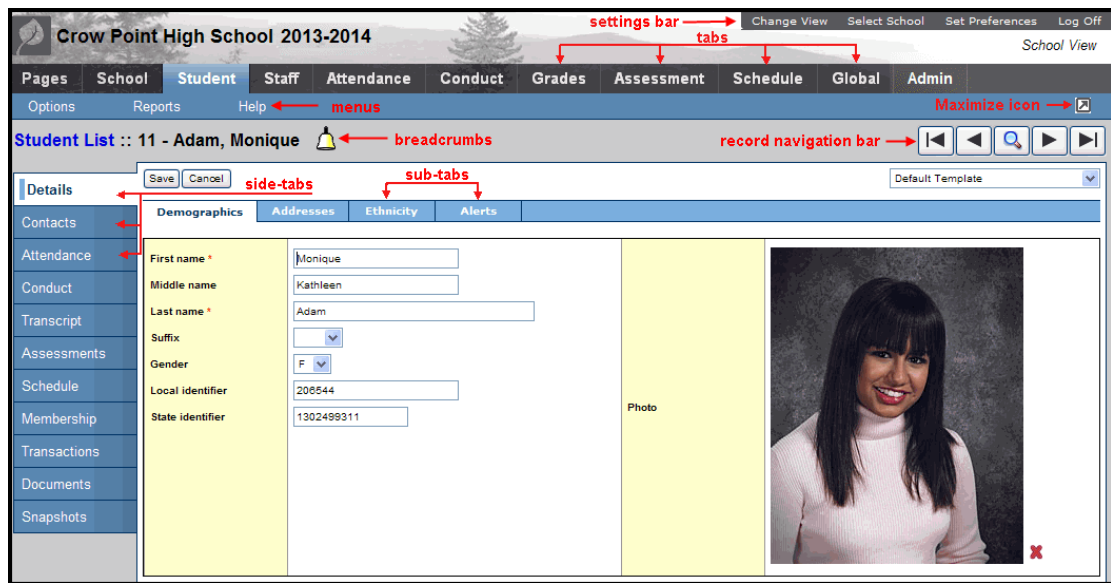
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Basic Navigation

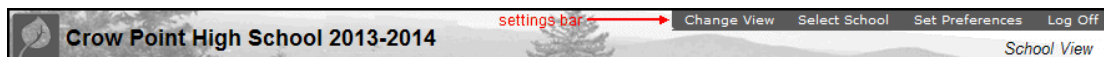
Aspen is your school district's student information platform. It contains all of your district's student information, such as grades, attendance, and schedules. It also contains information for your district's teachers, administrators, and administrative staff.

Use Aspen to view, enter, or edit student or staff information. First, you need some basic knowledge of how the system is organized, how data is stored, and ways to navigate. You should familiarize yourself with the following:

- [Settings bar](#)
- [Tabs, side-tabs, and sub-tabs](#)
- [Menus](#)
- Fields
- Field sets
- [Breadcrumbs](#)



Using the Settings Bar



On the settings bar, you can do the following:

- Click [Change View](#) to change to the District, School, Staff, Health, Build, Special Education, Personnel, Family, or Student view. You will not see the **Change View** option if you do not have access to more than one view.

Note: If you already logged on to a specific school, and you have access to more than one school, the settings bar also includes the **Select School** option. Click **Select School** to change to a different school. The settings bar includes the **Select Teacher** option when in the Staff view, if you have appropriate privileges.

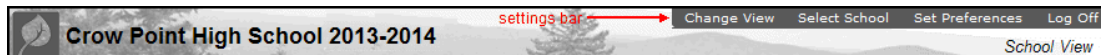
- Click [Set Preferences](#) to set your user preferences when using Aspen. For example, you can change your password or indicate that you want to be warned to save information when editing a column on a list.
- Click [Log Off](#) to log off from the system. For security reasons, it is important to log off before leaving your desk. Closing the browser window without first logging off from Aspen keeps the user session open. To minimize security risks, always click **Log Off** before closing the browser window.

Change Views

If you have access to more than one view, click **Change View** on the settings bar to change to a different view from any page in Aspen.

Also, you can set a default view in your user preferences.

Note: You will not see the **Change View** option if you do not have access to more than one view.



Some educators take on a number of different roles in a school system. For example, assume you are logged on to the high school's system as a technology director. First, you need to define a new user in the **Admin** tab. Then, since you are also a teacher, you need to access your gradebook for your classes. To do so, you would need to change to the Staff view.

To change views

1. On the settings bar, click **Change View**. The Change View menu appears:



2. Do one of the following:

- Click **District** to access information for all students and staff members in the district and to configure district settings.
- Click **Intermediate Organization** to access and view information for the students and staff members in one specific organization and configure organization settings.
- Click **School** to access and view information for the students and staff members in one specific school in the district and to configure school settings.
- Click **Staff** to manage attendance and grades for your classes.
- Click **Health** to manage student health information for a school.
- Click **Build** to build a master schedule for your school.
- Click **Special Education** to track IEPs and other information for your special education students across the district.
- Click **Family**, as a parent, to view all of your children's attendance, grade, and conduct information.
- Click **Student**, as a student, to keep track of your assignments and activities and store files in your virtual locker.

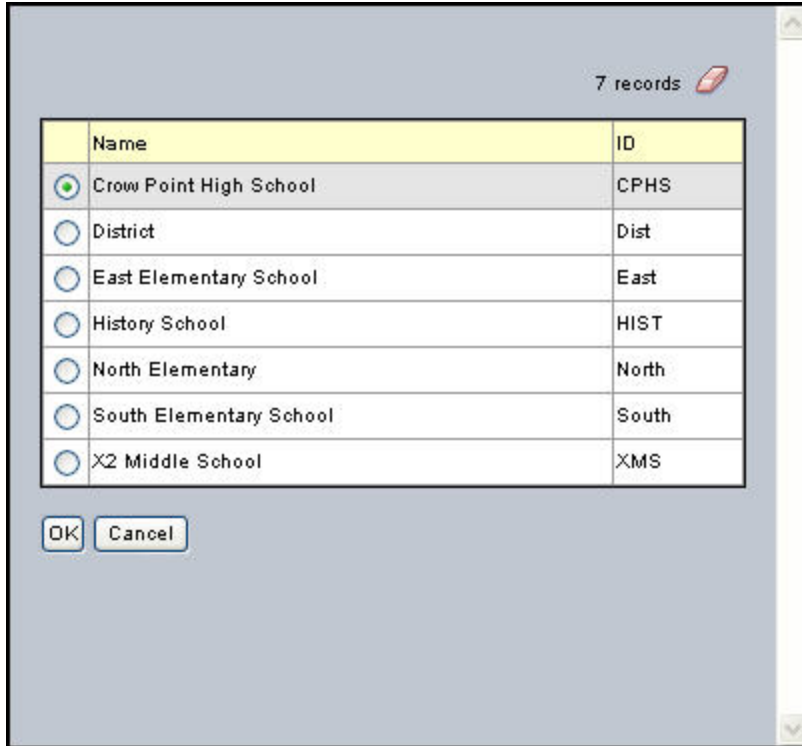
Note: An easy way to know which view you are in is by the color scheme — for example, maroon and gold for the District view, and blue and green for the School view.

If you are working in one view, change to another, and then change back to the first view, the system remembers the page you were previously working on. For example, assume you are viewing a student's transcript in the School view. Then, you change to the Build view. When you change back to the School view, the student's transcript you were originally viewing appears.

Change to Another School

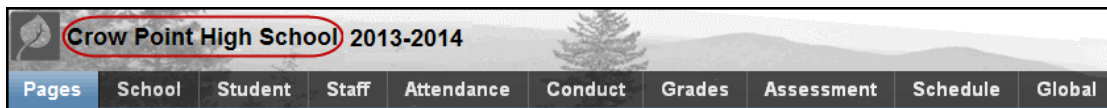
If you are already logged on to a specific school within your district, do the following to change to another school's information:

1. On the settings bar, click **Select School**. The School Pick List lists the schools you can access:



2. Select a school, and click **OK**. Aspen displays the same tab and side-tab that you were previously viewing; however, if you were on a detail page, then you would be returned to the list (since the list will contain all new records).

Note: The system displays the school you are logged on to in the upper-left corner of the page. Refer to this area to verify that you are logged on to the proper school:



Set Your User Preferences

You can configure a number of user preferences to make using Aspen faster and easier.

On the settings bar, click **Set Preferences**. The Set Preferences dialog box appears:

The screenshot shows a dialog box with a tabbed interface. The tabs are: General, Home, Security, Gradebook, Receipts, and Communication. The 'General' tab is selected and highlighted in yellow. The settings within the 'General' tab are as follows:

Setting	Value
Default locale	US English
Default View	School
Default school	Crow Point High School
Auto-save interval (minutes)	5
Disable User-defined Help	<input type="checkbox"/>
List Options	
Records per page	30
Show lower page controls	<input checked="" type="checkbox"/>
Warn on save	<input checked="" type="checkbox"/>






At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

The Set Preferences dialog box for the Staff view contains five tabs:

- General
- Home
- Security
- Gradebook
- Communication
- Receipts (if your school uses receipts)

Set Your Preferences on the General tab:

1. Click the **General** tab.
2. Use the following table to fill in the fields:

Field	Description
Default locale	<p>Click this drop-down to select your language and date preferences when using Aspen. This selection determines the language used on Aspen's pages and online Help, and in user guides.</p> <p>This selection also affects the display of dates in Aspen. If you select:</p> <ul style="list-style-type: none"> • English Canada: Dates appear as date/month/year • French Canada: Dates appear as year/month/date • US English: Dates appear as month/date/year
Default View	<p>Click this drop-down to select the default view you want you want to see when logging on to Aspen, such as the School view. (This option is only available if you have access to more than one view.)</p>
Default school	<p>Click  to select the default school you want to use when accessing the School view. (This option is only available if you have access to more than one school.)</p>
Auto-save interval (minutes)	<p>Type the number of minutes you want to lapse before the system automatically saves the information you enter on a detail page. The system displays a message to the right of Save and Cancel on detail pages, alerting you of the time of the last auto-save, or why the auto-save failed.</p> <div data-bbox="621 1077 1427 1199" style="border: 1px solid black; background-color: #e6f2ff; padding: 5px;"> <p>Note: If you move between sub-tabs of a detail page, the countdown continues.</p> </div>
Disable User-defined Help	<p>If your district creates and uses user-defined help, and you do not want to view the user-defined help icon  for fields and templates, select this checkbox.</p>
Records per page	<p>Type the number of rows you prefer on a list page. (Most users like to see all rows on a page without having to scroll.)</p>
Show lower page controls	<p>To display the page controls  1: Abbondanzio, Anthony   at the bottom of all list pages, select this checkbox.</p>
Warn on save	<p>If you want the system to display a warning when you click Save on a list page after you have used the Modify List option, select this checkbox.</p>

3. Click **OK** to save your preferences.

The screenshot shows a dialog box with five tabs: General, Home, Security, Gradebook, and Communication. The Home tab is selected and highlighted. The dialog contains a list of items with checkboxes to their right:

Item	Checked
Announcements	<input checked="" type="checkbox"/>
Favorites	<input checked="" type="checkbox"/>
Student search	<input checked="" type="checkbox"/>
Student Address Changes	<input type="checkbox"/>
Web sites	<input checked="" type="checkbox"/>
Tasks	<input type="checkbox"/>
Reports	<input checked="" type="checkbox"/>
Calendar	<input checked="" type="checkbox"/>

At the bottom of the dialog are two buttons: OK and Cancel.

2. Select the areas you want to appear on your Home page.

Note: If you select the **Student Address Changes** checkbox, the Address Changes section appears on the Home page in the School view only.

3. Click **OK**.

Set Your Preferences on the Home tab:

Note: The **Home** tab only appears if your user role is not restricted from editing your Home page.

1. Click the **Home** tab:

Basic Navigation

The screenshot shows a dialog box with five tabs: General, Home, Security, Gradebook, and Communication. The Home tab is selected. On the left, a list of items is shown with checkboxes: Announcements (checked), Favorites (checked), Student search (checked), Student Address Changes (unchecked), Web sites (checked), Tasks (unchecked), Reports (checked), and Calendar (checked). At the bottom are OK and Cancel buttons.

2. Select the areas you want to appear on your Home page.

Note: If you select the **Student Address Changes** checkbox, the Address Changes section appears on the Home page in the School view only.

3. Click **OK**.

Set Your Preferences on the Security tab:

1. Click the **Security** tab:

The screenshot shows the Security tab selected in the dialog box. The left pane lists various security settings, and the right pane contains the corresponding input fields:

Setting	Value / Action
Primary email	jsmith@aspenschools.org
Alternate email	jsmith@gmail.com
Google Docs email	Add Google Access
Security question	What are the last 4 digits of your SSN?
Security answer	••••
Confirm answer	••••
Security question for second password	What city did your father grow up in?
Security answer for second password	••••••
Confirm answer	••••••
Password	Change
Secondary Password	Change

At the bottom are OK and Cancel buttons.

2. Use the following table to enter information in the fields:

Field	Description
Primary email	<p>Type your primary email address. The system sends your password to this address if you click the 'I forgot my password' link on the logon page.</p> <p>Note: This is the address that appears in the From field when using the Send Email option.</p>
Security question	<p>Click this drop-down to select the security question you want to answer if you forget your password.</p> <p>Note: If you use Active Directory to log on to Aspen, this field does not appear.</p>
Security answer	<p>Type the answer to the security question.</p> <p>Note: If you use Active Directory to log on to Aspen, this field does not appear.</p>
Confirm answer	<p>Type the security answer.</p> <p>Note: If you use Active Directory to log on to Aspen, this field does not appear.</p>
<p>Note: The next three fields and the last field do not appear if:</p> <ul style="list-style-type: none"> You use the Active Directory to log on to Aspen, or Your district is not using secondary passwords. 	
Password	<p>Click Change to change your password.</p> <p>Note: If you use Active Directory to log on to Aspen, this field will not appear.</p>
Security question for secondary password	<p>Click this drop-down to select the security question you want to answer if you forget your secondary password.</p>
Security answer for secondary password	<p>Type the answer to the secondary password security question.</p>

Field	Description
Confirm answer	Type the security answer again.
Secondary password	Click Change to change your secondary password.

3. Click **OK**.

Set Your Preferences on the Gradebook tab:

To set your preferences on the Gradebook tab:


Note: The **Gradebook** preferences are only available in the Staff view.

1. Click the **Gradebook** tab:

2. Use the following table to fill in the fields:

Field	Description
Shade alternate lines	Select this checkbox if you want the system to shade every other row of your Grade Input page. Otherwise, deselect this checkbox.
Track administrator updates	Select this checkbox to have an Exclamation point appear next to any grades a staff member in the office changes in the School view.
Tab direction	Select whether you want the Tab key to move you across a row or down a column when you are entering grades on the Grade Input page.
Show studies	Select this checkbox if you want courses with a category of Study to appear in your gradebook.
Enable gradebook features	Select this checkbox if you want to use the Grade Input page to enter scores for assignments. If you do not select this checkbox, the gradebook only displays post columns (Term 1, Term 2, etc.).
Assignment column order	Select if you want assignments to appear in Date due (ascending) , Date due (descending) , or Sequence number order on the Scores page.
Show points in headers	At the Default weighting field, if you select Total Points , you can select the Show points in headers checkbox if you want to view the number of total points in the column header of an assignment.
Show category names in headers	Select this checkbox to display the names of assignment categories in the assignment headers.
Publish assignment statistics	Select this checkbox if you want low, median, and high assignment scores to appear for parents and students when they view grades using the Family and Student portals.
Show student alerts	Select this checkbox to display alert icons next to student names.
Show course selection recommendation	Select this checkbox to display the Recommendation column on the Scores page. Staff can only make recommendations during the date range defined by the school.
Anchor averages	Select this checkbox to left-align average columns on the Scores page. This way, the averages always appear next to the student information, and the assignments appear to the right:

Field	Description																																								
	<div data-bbox="597 258 1425 653" style="border: 1px solid black; padding: 5px;"> <p>Student Fields: Default Fields (dropdown) ...</p> <p>Grade Columns: All (dropdown) ...</p> <p>Term: All (dropdown) ...</p> <p>Status: En (dropdown)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #ffffcc;">Name</th> <th style="background-color: #ffffcc;">YOG</th> <th style="background-color: #ffffcc;">1</th> <th style="background-color: #ffffcc;">2</th> <th style="background-color: #ffffcc;">3</th> <th style="background-color: #ffffcc;">4</th> <th style="background-color: #ffffcc;">Part 10/01 Part 100 pts.</th> <th style="background-color: #ffffcc;">HWK 10/01 HWK 100 pts.</th> </tr> </thead> <tbody> <tr> <td>Anower, Connor</td> <td>2010</td> <td>83.0</td> <td>83.0</td> <td></td> <td></td> <td>78</td> <td>92</td> </tr> <tr> <td>Carlucci, Christine</td> <td>2010</td> <td>74.0</td> <td>75.0</td> <td></td> <td></td> <td>80</td> <td>80</td> </tr> <tr> <td>Fougere, Danielle</td> <td>2010</td> <td>87.0</td> <td>93.0</td> <td></td> <td></td> <td>92</td> <td>98</td> </tr> <tr> <td>French, Bianca</td> <td>2010</td> <td>77.0</td> <td>89.0</td> <td></td> <td></td> <td>88</td> <td>88</td> </tr> </tbody> </table> </div>	Name	YOG	1	2	3	4	Part 10/01 Part 100 pts.	HWK 10/01 HWK 100 pts.	Anower, Connor	2010	83.0	83.0			78	92	Carlucci, Christine	2010	74.0	75.0			80	80	Fougere, Danielle	2010	87.0	93.0			92	98	French, Bianca	2010	77.0	89.0			88	88
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<p>Show missing column</p>	<p>If you create special codes that you enter for missing assignments, select this checkbox to view the Missing column on the Scores page.</p> <p>For each student, the Missing column displays the total number of assignments you have entered those special codes for.</p> <p>The values in this column might help you when determining students' final grades for the term.</p> <div data-bbox="597 961 1425 1119" style="border: 1px solid black; background-color: #e6f2ff; padding: 5px;"> <p>Note: This column is for your eyes only. Students and family members do not see it in the portals, and office and administrative staff members do not see it in the School or District views.</p> </div>																																								
<p>Count empty as missing</p>	<p>If you selected the Show missing column checkbox, any assignments that were due before today, and that you have not entered scores for, are counted as missing.</p> <div data-bbox="597 1276 1425 1465" style="border: 1px solid black; background-color: #e6f2ff; padding: 5px;"> <p>Note: You might want to select this checkbox at the end of a term when you have finished entering all assignment scores. Otherwise, the Missing column will include scores for assignments you have not graded yet.</p> </div>																																								
<p>Show unscored</p>	<p>When selected, you will see all rubrics for the selected term for an individual student, even if no grade is entered. If it is not selected, you will only see the rubrics relevant to the term selected and with a grade entered.</p> <div data-bbox="597 1654 1425 1780" style="border: 1px solid black; background-color: #e6f2ff; padding: 5px;"> <p>Note: Rubric ratings must be set up in Aspen in order for this preference to take effect.</p> </div>																																								
<p>Default weighting</p>	<p>To indicate to the system how you calculate averages, do one of the following:</p>																																								

Field	Description
	<ul style="list-style-type: none"> • Select Categories only if you want to weight categories only in your gradebook. For example, assume you create three categories: Homework, Tests, and Quizzes. All homework assignments are worth the same amount, as are all tests and quizzes. To determine student term averages, Homework is worth 25% of the grade, Tests are worth 50% of the final grade, and Quizzes are worth 25% of the final grade. • Select Category and assignments if you want to weight both categories and assignments within those categories. For example, a student's homework average is worth 25% of the term grade, but each homework within the category is weighted differently. For example, you weight reading homework assignments 1, and intensive writing homework assignments 3. • Select Total points if you calculate averages by dividing the total points a student earns by the total number of points possible. For example, a student receives a 100, 90, and 80 for grades. The student's average is $270/300=90$. • Select Category total points if you want to use total points for individual assignments within categories that you weight. For example, assume you have a Homework category. The homework average counts as 25% of the student's final grade. Within the Homework category, you grade each individual assignment using points (HW 1 is worth 10 points, HW 2 is worth 20 points). <p>Note: This value becomes the default average mode for the teacher. Teachers can then assign a different average mode to different course sections in the gradebook.</p>
Decimals	Type the number of decimal places you want the system to use for calculated averages.
Grade scale	Click  to select the grade scale you want to use to calculate term averages. If you use a grade scale different than the district grade scale, when you update post columns, the system translates the grades to the district grade scale.
Semester cumulative average	<p>Select this checkbox to show semester running averages on your Scores page. Aspen calculates semester running averages based on the assignment grades within each of the terms inside of it, not on the average for each term.</p> <p>Students and family can view this column in the Student and Family views.</p>

Field	Description
	<p>Note: Your school must enable the School Grade preferences (for Show semester averages in the gradebook) for this user preference to be activated. See your Aspen system administrator for details.</p> <p>Aspen uses the column header Semester # (for example, Semester 1) for semester running average columns.</p>
Cumulative average	<p>Select this checkbox to show an overall cumulative average on your Scores page. The overall cumulative average includes all grades and scores entered since the beginning of the class, regardless of term. Aspen calculates the overall cumulative average using the average mode specified in your gradebook.</p> <p>Aspen uses the column header Cumulative for the overall cumulative average.</p> <p>Note: Your school must enable its Grade preferences for this user preference to be activated. See your Aspen system administrator for details.</p>

3. Click **OK**.

To set your preferences on the Receipts tab (if your school uses receipts):

Note: The **Receipts** tab only appears if your district or intermediate organization is set up for receipt printing.

1. Click the **Receipts** tab:

The screenshot shows a dialog box with a tabbed interface. The tabs are General, Home, Security, Gradebook, Receipts, and Communication. The Receipts tab is selected and highlighted in blue. The main content area has a yellow background and contains three settings:

- Print attendance receipts:** A checkbox that is currently unchecked.
- Show preview:** A checkbox that is currently unchecked.
- Number of copies:** A text input field containing the number 1.

At the bottom of the dialog box, there are two buttons: **OK** and **Cancel**.

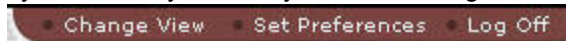
Basic Navigation

2. Select the **Print attendance receipts** checkbox if a receipt should print when attendance is entered on the Office Input page.
3. Select the **Show preview** checkbox if a preview of the receipt should appear before it is sent to the printer.
4. Type the number of copies you want to print.
5. Click **OK**.

Note: You must set the receipt printer as your default printer. In Windows, click the **Start** button, click **Control Panel**, click **Hardware and Sound** or **Printers and Other Hardware**, and then click **Printers** or **Printer and Faxes**. Right-click the receipt printer, and then select **Set as Default Printer**. A checkmark on the receipt printer icon marks it as the default printer.

Log Off

To keep your district, school, student, and staff information secure, you should log off from the system when you leave your desk. To log off, click **Log Off** on the settings bar

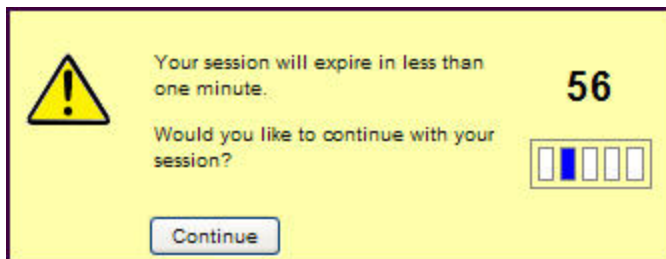


On the Log On page, you can log on to the system when you return to your desk or when you need to use the system again.

Closing your browser without first logging off does not log you out of Aspen. Technically, your session is still active until your session times out, which is a preference set by your Aspen system administrator.

When Your System Times Out

Your district or intermediate organization determines the number of minutes your session can be idle before the system automatically logs you off. The system warns you with one minute left:



Click **Continue** to continue your session. Otherwise, your session expires, with the expiration time listed. Click **OK**, and the Log On page appears.

Enter Data into Fields

An Aspen page is comprised of **fields** which store particular information. A collection of fields is called a **record** or **table**. Aspen contains over 300 tables. Every table has a set number of fields.

For example, the Student table is comprised of 254 fields: 27 of them are system-defined, and 227 are user-defined. Some system-defined fields on the Student table include:

- student's name
- student's address
- student's phone number

A field is comprised of two parts:

- field name
- entry field

First name *	<input type="text" value="Daniel"/>
--------------	-------------------------------------

Type of Fields

Aspen's fields can be one of the following general types:

Entry fields

Users enter data into these two types of entry fields:

- **Required:** The user must enter data in order to proceed and save the data entered on the page. Required fields have a red asterisk * next to the name. If you define a user-defined field as required, it will also display the red asterisk.

First name *	<input type="text" value="Daniel"/>
--------------	-------------------------------------

Note: Not all samples of pages and fields shown in Aspen's online help and user guides show the red asterisk indicating a required field.

- **Optional:** The user is not required to enter data in order to proceed. User can enter data or leave it blank.

Middle name	<input type="text" value="Edward"/>
-------------	-------------------------------------

Display-only fields

User cannot enter data into these two types of fields. These fields cannot be edited. They display information.

- **Calculated:** The user does not enter data here. This field's data is derived from a formula involving other fields. Aspen automatically determines the correct value. This is a display-only field.

The GPA is an example of a calculated field.

- **Read-only:** The user does not enter data here. These fields are for displaying internal system information that cannot be changed, such as the object identifier (OID), the system's internal name for the field which is used when exporting, importing, and writing reports and templates.

Object identifier	gcdColName
-------------------	------------

Most fields have attributes associated with them which determines the type of data that can be entered in the entry field. For example, fields can be numeric, textual, long text, or short text. These are defined by system administrators in the Data Dictionary and references tables, which work together to allow administrators to control what data is stored in fields and what type of data users can enter.

Validate Address Format

When you enter an address in an address field, Aspen breaks down the components of the address into multiple address fields so the display of the address is appropriate for the selected organization or locale (U.S., Europe, Japan, military, etc.).


If you do not know the correct format of an address, you can enter it into the address field and have Aspen validate the format – verify that the text entered is in the correct format, and if it is not, correct it.

System administrators define the address format for an organization in the general preferences. The following table gives examples of a U.S. address and a German address and how Aspen parses them into the appropriate fields:

Address field	User enters...	Address components	System validated for U.S. address
Address line 1	350 Lincoln Street	Street number	350
		Street name	Lincoln
		Street type	Street
Address line 2			
Address line 3	Hingham, MA 02043	City	Hingham
		State/Province	MA
		Postal Code	02043
Address field	User enters...	Address components	System validated for German address
Address field 1	Strandstraße 4A	Street name	Strandstraße
		Street number	4
		Street letter	A
Address field 2			
Address field 3	70174 Stuttgart	Postal code	70174
		City	Stuttgart

Note: Validating an address verifies the **format** of the address. Validating **does not** verify that the address is correct for the person, or that the address is valid for the town.

To validate the format of an address:

1. At an address field, type the appropriate information for the address line.
2. Click the **Validate Format** button . The Address Components dialog box appears:

Address line 1	24 North Street	Validate
User validated	<input type="checkbox"/>	
Address components		
Street number	24	
Street prefix		
Street pre direction		
Street name	North	
Street type	Street	▼
Street post direction		
FieldC001		
	Format	US Street ▼
OK	Cancel	

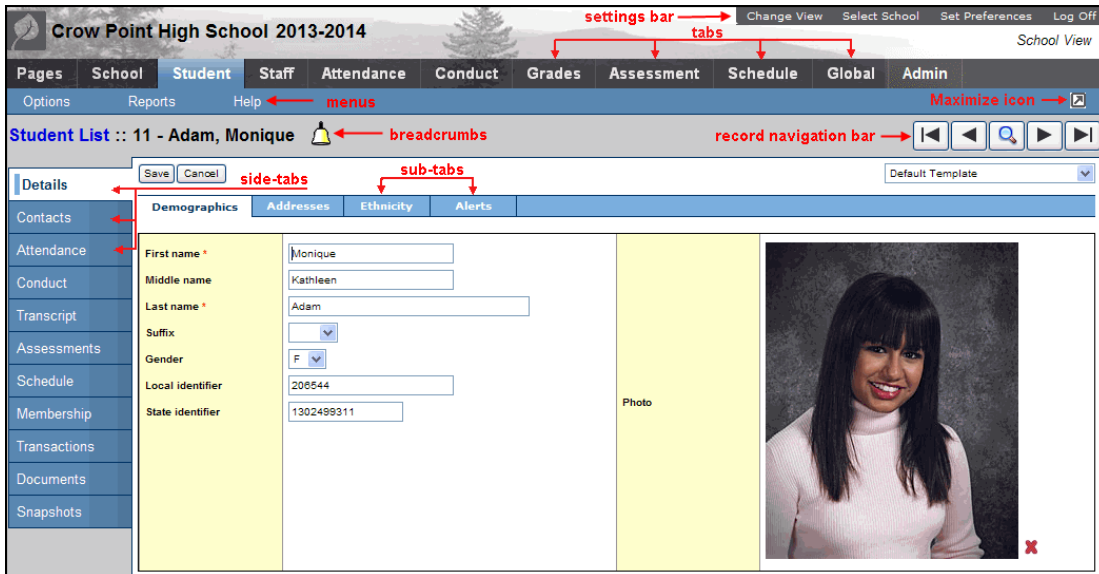
3. The **Address line 1** field displays the text as you entered it. In the **Address components** section, the fields display how Aspen has validated the format and parsed the components into the individual fields. Click **Validate** to ensure the address entered correctly. To manually enter the components of the address into the individual fields or to override a system-validated address, select the **User validated** checkbox and type the address in the fields below.

Note: When an address is user-validated,  appears next to the address field.

4. Click **OK**.

Use Tabs, Side-Tabs, and Sub-tabs

Aspen is similar to a filing cabinet – it organizes folders of information with tabs, side-tabs, and sub-tabs:



The same tabs appear at the top of each page so that you can quickly access another folder of information.

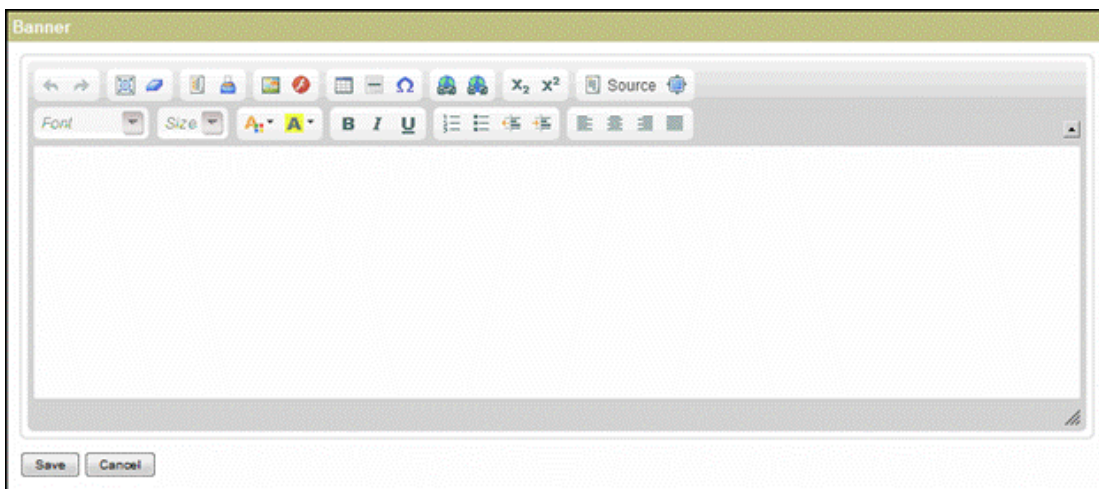
Note: The tab you select is a different color than the rest.

After you click a tab, side-tabs specific to that tab appear on the left side of the page.


Note: To quickly access information on a sub-tab for a specific record, select that record's checkbox and then click the side-tab.

Rich Text Editor

Aspen has a rich text editor that can be used for creating and editing Pages :



Use the following chart as a reference for using the rich text editor:

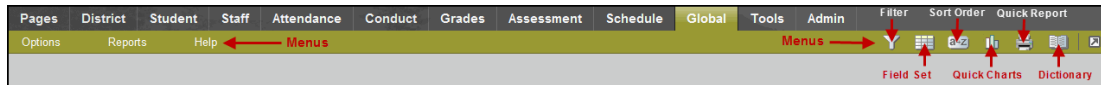
Text Editor Tool	Function
	Undo: Cancels the last action performed.
	Redo: Cancels an undo.
	Select all: Selects everything in the dialog box.
	Remove Format: Removes any formatting (bold, italic, etc.) from the selected text.
	Templates: Opens a template in the editor.
	Print: Prints the text box.
	<p>Image: Inserts an image into the text box. You can either:</p> <ul style="list-style-type: none"> • Copy and paste the URL of the image in the URL field, or • Click Browse for Image to insert an image saved on your computer.
	Flash: Inserts a flash application into the text box.
	Table: Inserts a table into the text box.
	Insert Horizontal Line: Inserts a horizontal line into the text box.
	Insert Special Character: Inserts a special character into the text box.
	Link: Inserts a hyperlink into the text box.
	Unlink: Removes a hyperlink from the text box.
	Subscript: Allows typing in subscript.
	Superscript: Allows typing in superscript.
	Source: Allows viewing or editing the HTML of the text. Currently not supported in Microsoft® Internet Explorer.
	Maximize: Click to maximize the text box to fill your browser's screen. Click again to minimize the text box.

Text Editor Tool	Function
	Font: Changes the text's font.
	Size: Changes the text's size.
	Text color: Changes the text's color.
	Background color: Changes the text's background color.
	Bold: Changes text to bold.
	Italic: Italicizes text.
	Underline: Underlines text.
	Insert/remove numbered list: Inserts a numbered list. Click again to remove a numbered list.
	Insert/Remove Bulleted List: Insert a bulleted list. Click again to remove a bulleted list.
	Decrease Indent: Decreases an indent.
	Increase Indent: Increases an indent.
	Left Justify: Formats the text with a left justification.
	Center Justify: Formats the text with a center justification.
	Right Justify: Formats the text with a right justification.
	Block Justify: Formats the text with a block justification.
	Collapse Toolbar: Collapses the rich text toolbar.
	Expand Toolbar: Expands the rich text toolbar.

Using Menus

For every tab, menus appear below the tab names:

Basic Navigation

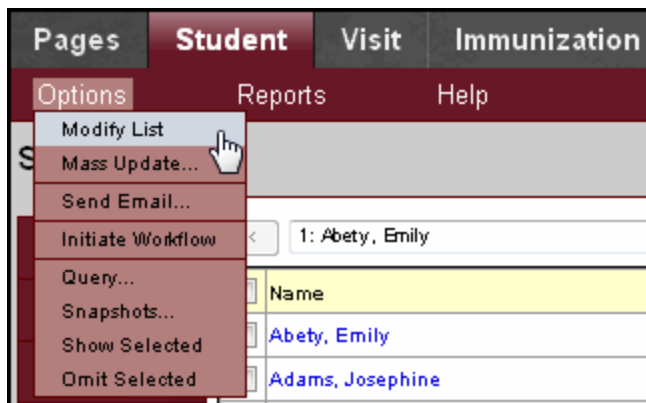


Depending on the page, a combination of the following menus appears:

- [Options menu](#)
- [Reports menu](#)
- [Help menu](#)
- [Field Set menu](#)
- [Filter menu](#)
- [Sort Order menu](#)
- [Quick Chart menu](#)

Using the Options Menu

Use the **Options** menu to select, search for, filter, or perform actions on the records currently appearing on the list page:



The **Options** menu contains selections appropriate for the current page.

Standard options are:

- [Modify List](#)
- [Mass Update](#)
- [Query](#)
- [Snapshots](#)
- [Show Selected](#)
- [Omit Selected](#)

Additional options that might be on your menu include:

- [Send Email](#)
- [Initiate Workflow](#)

Modify List

Use the **Modify List** option to quickly and easily edit text on a list page for any field that is editable. This is especially useful when you need to change values for multiple records.

Note: If you need to change a particular value to the same value for a large number of records, it makes sense to perform a [mass update](#).

To use the Modify List option:

1. Go to any list page, such as the Student List:

Student List								
0 of 760 selected								
Primary Active Students								
	Name	LASID	SASID	Grade	Homeroom	DOB	EnrStatus	Email 1
<input type="checkbox"/>	Adkerman, James	293479	1345564569	11	C107	8/19/1992	Active	jadkerman@comcast.com
<input type="checkbox"/>	Adam, Monique	208544	1302499311	11	E207	1/20/1993	Active	madam@blueyonder.com
<input type="checkbox"/>	Adams, Tyler	297230	1852228004	12	D107	7/10/1991	Active	tleviis@worldmail.com
<input type="checkbox"/>	Aldoriso, Mingle	232039	1172991282	10	4	11/13/1993	Active	maldoriso@eudora.com
<input type="checkbox"/>	Allen, Diana	208672	1129254645	09	E107	12/26/1993	Active	dallen@aol.com
<input type="checkbox"/>	Alper, Heather	248235	1062556430	11	C206	11/15/1993	Active	halper@blueyonder.com
<input type="checkbox"/>	Amico, Elaine	244040	1304051361	12	B206	8/20/1991	Active	epilla@hotmail.com
<input type="checkbox"/>	Amico, Joseph	205314	1215480988	11	H201	1/2/1993	Active	jamico@eudora.com
<input type="checkbox"/>	Amico, Timothy	241387	1062645502	09	GYMA	1/14/1995	Active	tamico@eudora.com
<input type="checkbox"/>	Anderson, Isabella	283490	1260305854	09	B105	5/12/1995	Active	ipost@earthlink.com
<input type="checkbox"/>	Anderson, Lee	260687	1208268062	10	D114	2/24/1994	Active	lvenkatesh@earthlink.com
<input type="checkbox"/>	Anderson, Margaret	236301	1395487850	11	C108	6/20/1992	Active	manderson@comcast.com
<input type="checkbox"/>	Anderson, Rose	255284	1188397751	12	C108	5/3/1992	Active	randerson@eudora.com

2. From the **Options** menu, click **Modify List**. A **Pencil** appears below the names of fields that can be edited:

Student List								
0 of 760 selected								
Primary Active Students								
	Name	LASID	SASID	Grade	Homeroom	DOB	EnrStatus	Email 1
<input type="checkbox"/>	Adkerman, James							
<input type="checkbox"/>	Adam, Monique	208544	1302499311	11	E207	1/20/1993	Active	madam@blueyonder.com
<input type="checkbox"/>	Adams, Tyler	297230	1852228004	12	D107	7/10/1991	Active	tleviis@worldmail.com
<input type="checkbox"/>	Aldoriso, Mingle	232039	1172991282	10	4	11/13/1993	Active	maldoriso@eudora.com
<input type="checkbox"/>	Allen, Diana	208672	1129254645	09	E107	12/26/1993	Active	dallen@aol.com
<input type="checkbox"/>	Alper, Heather	248235	1062556430	11	C206	11/15/1993	Active	halper@blueyonder.com
<input type="checkbox"/>	Amico, Elaine	244040	1304051361	12	B206	8/20/1991	Active	epilla@hotmail.com
<input type="checkbox"/>	Amico, Joseph	205314	1215480988	11	H201	1/2/1993	Active	jamico@eudora.com
<input type="checkbox"/>	Amico, Timothy	241387	1062645502	09	GYMA	1/14/1995	Active	tamico@eudora.com
<input type="checkbox"/>	Anderson, Isabella	283490	1260305854	09	B105	5/12/1995	Active	ipost@earthlink.com
<input type="checkbox"/>	Anderson, Lee	260687	1208268062	10	D114	2/24/1994	Active	lvenkatesh@earthlink.com
<input type="checkbox"/>	Anderson, Margaret	236301	1395487850	11	C108	6/20/1992	Active	manderson@comcast.com

3. Click in the column containing the text you want to edit. Two new icons replace the pencil in the selected column:

Homeroom	
<input checked="" type="checkbox"/> <input type="checkbox"/>	
40	Urdi, M
3	Coyne, M

- Do one of the following:
 - Select a checkbox to change its value to "yes," or deselect it to change its value to "no".
 - Use the drop-down to select the desired value.
 - Type a value in the blank field.
- Repeat Step 4 for as many records as you need to modify.
- When you have finished making your modifications, at the top of the column:
 - Click to save all of your changes. *If you don't do this before moving to a new page, all of your changes will be lost.*
 - Click to discard all of your changes and leave the values in the column as they were.

Mass Update

Use the **Mass Update** option to permanently change one set of values to another set of values for the same field. For example, maybe all of the students in Homeroom 101 are being switched to Homeroom 14.

It is possible to mass update a field with another field or an expression. For those, you need to perform an Advanced Mass Update.

Note: Before you perform a mass update, you must select the records you want to work with. If you neglect to do this, you might accidentally mass update all of the records in your database.


Important: It is not possible to reverse a mass update. Proceed with caution.

To use the Mass Update option:

- Go to any list page, such as the Student List:

Pages School Student Staff Attendance Conduct Grades Assessment Schedule Global									
Options Reports Help									
Student List									
1: Ackerman, James 0 of 760 selected Primary Active Students									
	Name	LASID	SASID	Grade	Homeroom	DOB	Enr Status	Email 1	
<input type="checkbox"/>	Ackerman, James	293479	1345564569	11	C107	8/19/1992	Active	jackerman@comcast.com	
<input type="checkbox"/>	Adam, Monique	206544	1302499311	11	E207	1/20/1993	Active	madam@blueyonder.com	
<input type="checkbox"/>	Adams, Tyler	297230	1652226004	12	D107	7/10/1991	Active	tlevist@worldmail.com	
<input type="checkbox"/>	Aldoriso, Mingle	232039	1172991282	10	4	11/13/1993	Active	maldoriso@eudora.com	
<input type="checkbox"/>	Allen, Diana	208672	1129254645	09	E107	12/26/1993	Active	dallen@aol.com	
<input type="checkbox"/>	Alper, Heather	248235	1062556430	11	C206	11/15/1993	Active	halper@blueyonder.com	
<input type="checkbox"/>	Amico, Elaine	244040	1304051361	12	B206	6/20/1991	Active	epilla@hotmail.com	
<input type="checkbox"/>	Amico, Joseph	205314	1215480988	11	H201	1/2/1993	Active	jamico@eudora.com	
<input type="checkbox"/>	Amico, Timothy	241387	1062645502	09	GYMA	1/14/1995	Active	tamico@eudora.com	
<input type="checkbox"/>	Anderson, Isabella	283490	1260305854	09	B105	5/12/1995	Active	ipost@earthlink.com	
<input type="checkbox"/>	Anderson, Lee	260687	1208266062	10	D114	2/24/1994	Active	lvenkatesh@earthlink.com	
<input type="checkbox"/>	Anderson, Margaret	236301	1395487850	11	C108	6/20/1992	Active	manderson@comcast.com	
<input type="checkbox"/>	Anderson, Rose	255264	1188397761	12	C108	5/3/1992	Active	randerson@eudora.com	

- Select the records you want to mass update by doing one of the following:
 - Select their checkboxes and then from the **Options** menu, select **Show Selected**.
 - Use a query.
 - Use a snapshot.

Note: Be sure to check the record counter to verify that it lists the correct number, such as  if you selected 25 records.

- From the **Options** menu, click **Mass Update**. The Mass Update dialog box appears:

Field	<div style="border: 1px solid gray; width: 100%; height: 20px; background-color: #e0e0e0;"></div>
Value	<div style="border: 1px solid gray; width: 100%; height: 20px;"></div>

Update
Cancel
Advanced

- Use the **Field** drop-down to select the field whose value you want to replace, such as **Home-room**.
- Type or select the **Value** to replace the existing value. For yes/no fields, such as **Include in Honor Roll**, a checkbox appears. Select the checkbox to indicate a value of *true* or *yes*. Deselect the checkbox to indicate a value of *false* or *no*.
- Click **Update**.
- The system confirms the field and value that you selected. Click **OK** or **Cancel**.
- If you clicked **OK**, the system confirms the number of records that will be affected and asks if you want to continue. Click **OK** to complete the mass update or **Cancel** to cancel the operation.

Advanced Mass Update with an Expression

Use an advanced mass update when you need to permanently update a field with an expression. Doing so can reduce your workload. For example, one advanced mass update can produce the same results as two queries and two simple mass updates. Expressions also permit updates that simply aren't available any other way.

An expression is a string that can contain a mix of variable and literal tokens. Variable tokens are enclosed in braces ('{' and '}') and contain a period-delimited string of accessors (accessors are referenced by the Java name, which can be found in the Data Dictionary). A variable token might also contain a function and parameters for that function. Literal tokens are any portions of the expression that are not variable tokens. The following is an example of an expression:

```
{person.lastName}, {person.firstName}
```

This expression could be parsed into the following list of tokens:

1. VariableToken: "person.lastName"
2. LiteralToken: ", "
3. VariableToken: "person.firstName"

The final result might be a value like "Doe, John".

Note: Before you perform an advanced mass update, you must select the records you want to work with. If you neglect to do this, you might accidentally mass update all of the records in your database.

IMPORTANT: It is not possible to reverse a mass update. Proceed with caution.

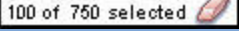
To use the Advanced Mass Update option:

1. Go to any list page, such as the Student List:

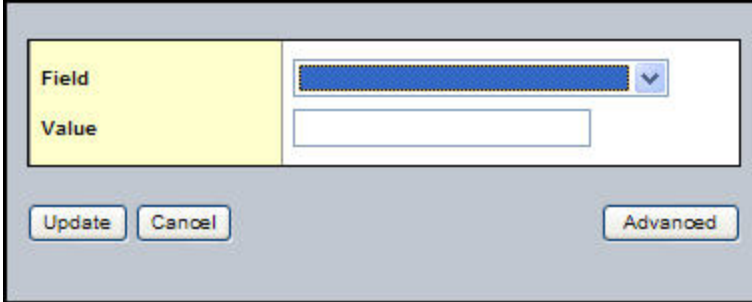
Name	LASID	SASID	Grade	Homeroom	DOB	EnrStatus	Email 1
Ackerman, James	293479	1345564569	11	C107	8/19/1992	Active	jackerman@comcast.com
Adam, Monique	208544	1302499311	11	E207	1/20/1993	Active	madam@blueyonder.com
Adams, Tyler	297230	1652226004	12	D107	7/10/1991	Active	tlewis@worldmail.com
Aldorizio, Mingle	232039	1172991282	10	4	11/13/1993	Active	maldorizio@eudora.com
Allen, Diana	208872	1129254645	09	E107	12/26/1993	Active	dallen@aol.com
Alper, Heather	248235	1062556430	11	C208	11/15/1993	Active	halper@blueyonder.com
Amico, Elaine	244040	1304051361	12	B206	9/20/1991	Active	epilla@hotmail.com
Amico, Joseph	208314	1215480988	11	H201	1/2/1993	Active	jamilco@eudora.com
Amico, Timothy	241387	1062645502	09	GYMA	1/14/1995	Active	tamilco@eudora.com
Anderson, Isabella	283490	1260305854	09	B105	5/12/1995	Active	ipost@earthlink.com
Anderson, Lee	260687	1208266082	10	D114	2/24/1994	Active	lvenkatesh@earthlink.com
Anderson, Margaret	236301	1395487850	11	C108	8/20/1992	Active	manderson@comcast.com
Anderson, Rose	265264	1188397751	12	C108	5/3/1992	Active	randerson@eudora.com

2. Select the records you want to mass update by doing one of the following:

- Select their checkboxes and then from the **Options** menu, select **Show Selected**.
- Use a [query](#).
- Use a [snapshot](#).

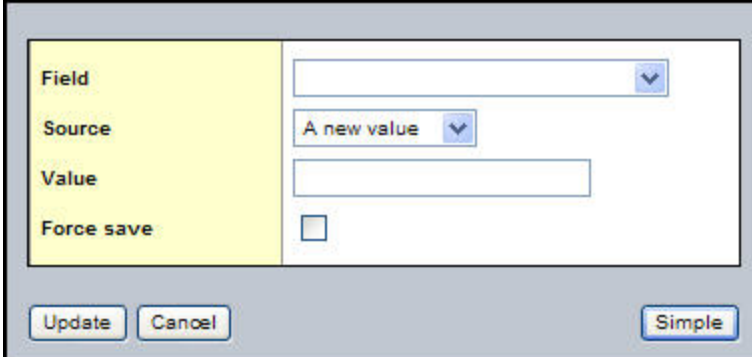
Note: Be sure to check the record counter  at the top of the page to verify that it shows the correct number. Regardless of what records are selected, performing a mass update will always update the total number of records. If the record counter shows "100 of 750 selected," you will update 750 records if you forget to do **Options > Show Selected**.

3. From the **Options** menu, click **Mass Update**. The Mass Update dialog box appears:



The dialog box has a yellow sidebar on the left with labels: **Field**, **Value**, **Update**, **Cancel**, and **Advanced**. The main area contains a dropdown menu for **Field** and a text input field for **Value**.

4. Click **Advanced**. The Mass Update dialog box expands:



The dialog box has a yellow sidebar on the left with labels: **Field**, **Source**, **Value**, **Force save**, **Update**, **Cancel**, and **Simple**. The main area contains a dropdown menu for **Field**, a dropdown menu for **Source** (showing "A new value"), a text input field for **Value**, and a checkbox for **Force save**.

5. Use the **Field** drop-down to select the field whose value you want to replace.
6. Use the **Source** drop-down to select **An expression**.
7. In the **Value** field, enter an expression of literal and/or variable tokens.
8. Select the **Force save** checkbox to override the validation of required or restricted fields during the mass update process. If you don't select this checkbox and a record has validation errors, then it will not be saved.
9. Click **Update**. The system confirms the field and value that you selected.
10. Click **OK** or **Cancel**.
11. If you clicked **OK**, the system confirms the number of records that will be affected and asks if you want to continue. Click **OK** to complete the mass update or **Cancel** to cancel the operation.

Note: Some mass update operations can take several minutes to complete if the number of records to be updated is several thousand or more.

Simple Examples

- To populate a new, user-defined field on the Student table so that it holds every student's full name in the format "First Middle Last" (for the purposes of running a Quick Report or customizing labels, for example), use the following syntax in the **Expression** box:

```
{person.firstName} {person.middleName} {person.lastName}
```

- A school has just completed construction on a new wing. All current room numbers need to be prefixed with the letter 'A' to indicate the A wing:

```
A{roomNumber} (the value for room number is appended to the literal 'A')
```

Note: An operation like this is best performed using a temporary, user-defined field:

- Enable a user-defined field called **New Room** in the Data Dictionary on the School Classroom table.
- Mass update the **New Room** field with the above expression.
- If successful, mass update the **Number** field using the **Another Field** option (copying from another field eliminates the risk that is inherent in using expressions).
- Reset the temporary **New Room** field in the Data Dictionary so it can be used again later.

Variable Token Functions

Variable tokens can also include functions to manipulate the resulting value. Functions are delimited with parentheses followed by a list of arguments. The supported functions are outlined in the following tables:

Note: Variables are case-sensitive; function names are not.

Function	UPPER(fieldName)
Description	This function converts all letters in a string to lowercase.
Parameters	fieldName – the accessor to evaluate
Example	<p>From the Student List you could use this expression to convert all middle names to lower case:</p> <pre>{LOWER(person.middleName)}</pre> <p>The name Charles would become charles.</p>

Function	UPPER(fieldName)
Description	This function converts all letters in a string to uppercase.
Parameters	fieldName – the accessor to evaluate
Example	<p>From the Student List you could use this expression to convert all middle names to upper case:</p> <p>{UPPER(person.middleName)}</p> <p>The name Charles would become CHARLES.</p>

Function	PROPER(fieldName, allWords)
Description	This function converts the first letter of a word to uppercase and the remaining letters to lowercase.
Parameters	<p>fieldName – the accessor to evaluate</p> <p>allWords – either true or false. If true then all words in the value will be capitalized. If false then only the first word will be.</p>
Example	<p>From the Course List you could use this expression to convert all course names to proper case:</p> <p>{PROPER(description, true)}</p> <p>The course name <i>INTRODUCTION TO PHOTOGRAPHY</i> would become <i>Introduction To Photography</i>.</p> <p>{PROPER(description, false)}</p> <p>The course name INTRODUCTION TO PHOTOGRAPHY would become Introduction to photography.</p>

Function	PADL(fieldname, length, 'padCharacter')
Description	This function adds enough pad characters to the left of the string (a prefix) to reach the specified length. This is typically used for alignment purposes.
Parameters	<p>fieldName – the accessor to evaluate</p> <p>length – the final, padded length of the string</p> <p>padCharacter – the single character used for padding, this value must be wrapped in single quotes (e.g., ' ' or '0')</p>
Example	<p>From the Student List you could use this expression to right-align grade levels:</p> <pre>{PADL(gradeLevel, 2,'0')}</pre> <p><i>Before:</i></p> <p>7 8 9 10</p> <p><i>After:</i></p> <p>07 08 09 10</p>

Function	PADR(fieldname, length, ')
Description	This function adds enough pad characters to the right of the string (a suffix) to reach the specified length. This is typically used for alignment purposes.
Parameters	fieldName – the accessor to evaluate length – the final, padded length of the string padCharacter – the single character used for padding, this value must be wrapped in single quotes (e.g., ' ' or '0')
Example	From the Course List you could use this expression to align course numbers and descriptions: <pre>{PADR(number,5,' ')} {description}</pre> <i>Before:</i> 123 Cooking 101 1750 Chemistry 24689 History <i>After:</i> 123 Cooking 101 1750 Chemistry 24689 History

Function	IF(fieldName, operator, 'trueResult', 'falseResult')
Description	This function represents a conditional evaluation. If the condition evaluates to true then one value is output; otherwise, the other value is output.
Parameters	<p>fieldName – the accessor to evaluate</p> <p>operator – one of the following values:</p> <ul style="list-style-type: none"> equals equalsIgnoreCase notEqualTo notEqualToIgnoreCase contains beginsWith endsWith isEmpty <p>comparedValue – the test value used for comparisons, this value must be wrapped in single quotes</p> <p>trueResult – the resulting value if the condition evaluates to true</p> <p>falseResult – the resulting value if the condition evaluates to false</p>
Example	<p>From the Student List you could use this expression to set calendar codes:</p> <p style="text-align: center;">{IF(gradeLevel,equals,'12','Senior','Standard')}</p>

Show Selected

Use the **Show Selected** option to narrow down the group of records you need to view or work with just this one time.

Use **Show Selected** when you only need to keep a small portion of the records you are currently viewing. Use **Omit Selected** when you only need to remove a small portion of the records you are currently viewing.

To return to viewing the entire list, click the **Filter** menu , and click **All Records**.


To use the 'Show Selected' option:

1. Go to any list page, such as the Student List:

Pages School Student Staff Attendance Conduct Grades Assessment Schedule Global									
Options Reports Help									
Student List									
1: Ackerman, James 0 of 760 selected Primary Active Students									
	Name	LASID	SASID	Grade	Homeroom	DOB	Enr Status	Email 1	
<input type="checkbox"/>	Ackerman, James	293479	1345564569	11	C107	8/19/1992	Active	jackerman@comcast.com	
<input type="checkbox"/>	Adam, Monique	206544	1302499311	11	E207	1/20/1993	Active	madam@blueyonder.com	
<input type="checkbox"/>	Adams, Tyler	297230	1652226004	12	D107	7/10/1991	Active	tleviss@worldmail.com	
<input type="checkbox"/>	Aldoriso, Mingle	232039	1172991282	10	4	11/13/1993	Active	maldoriso@eudora.com	
<input type="checkbox"/>	Allen, Diana	208672	1129254645	09	E107	12/26/1993	Active	dallen@aol.com	
<input type="checkbox"/>	Alper, Heather	248235	1062556430	11	C206	11/15/1993	Active	halper@blueyonder.com	
<input type="checkbox"/>	Amico, Elaine	244040	1304051361	12	B206	8/20/1991	Active	epilla@hotmail.com	
<input type="checkbox"/>	Amico, Joseph	205314	1215480988	11	H201	1/2/1993	Active	jamico@eudora.com	
<input type="checkbox"/>	Amico, Timothy	241387	1062645502	09	GYMA	1/14/1995	Active	tamico@eudora.com	
<input type="checkbox"/>	Anderson, Isabella	283490	1260305854	09	B105	5/12/1995	Active	ipost@earthlink.com	
<input type="checkbox"/>	Anderson, Lee	260687	1208266062	10	D114	2/24/1994	Active	lvenkatesh@earthlink.com	
<input type="checkbox"/>	Anderson, Margaret	236301	1395487850	11	C108	6/20/1992	Active	marderson@comcast.com	
<input type="checkbox"/>	Anderson, Rose	255264	1188397761	12	C108	5/3/1992	Active	randerson@eudora.com	

- Select the checkboxes next to the names of the students you want to view.

Note: The number of records you selected appears in the record counter

12 of 760 selected 

To quickly deselect these records, click the **Eraser** icon .

- From the **Options** menu, click **Show Selected**:

Pages School Student Staff Attendance Conduct Grades Assessment Schedule Global									
Options Reports Help									
Student List									
0 of 12 selected Custom Selection									
	Name	LASID	SASID	Grade	Homeroom	DOB	Enr Status	Email 1	
<input type="checkbox"/>	Skorupka, Rادی	243858	1015018177	12	C284	6/14/1992	Active		
<input type="checkbox"/>	Gildea, Anne	244172	1096262222	09	M115	7/24/1995	Active	aaabraham@hotmail.com	
<input type="checkbox"/>	Larsen, Ariana	236452	1319637174	11	B105	6/28/1993	Active	aaarnold@comcast.com	
<input type="checkbox"/>	Balbio, Aaron	212984	1252179011	10	A201	6/27/1994	Active	abalbio@aol.com	
<input type="checkbox"/>	Colpoys, Andy	279896	1103334720	12	intern	1/8/1992	Active	abaratta@msn.com	
<input type="checkbox"/>	Smith, Aaron	292960	1347765249	10	LABB	1/8/1994	Active	abarman@msn.com	
<input type="checkbox"/>	Koert, Alice	266058	1229048414	09	B206	4/16/1995	Active	abamashi@comcast.com	
<input type="checkbox"/>	Weng, Anthony	266512	1381656801	09	A209	1/21/1995	Active	abarthey@topica.com	
<input type="checkbox"/>	Beardon, Andrew	212841	1071310016	09	A209	10/21/1994	Active	abeardon@yahoo.com	
<input type="checkbox"/>	Bossi, Ann	200553	1357434960	11	D107	2/5/1993	Active	abossi@msn.com	
<input type="checkbox"/>	Powell, Ashley	289793	1321650544	11	LABB	3/23/1993	Active	abuonopane@worldmail.com	
<input type="checkbox"/>	Burke, Alan	223419	1226501816	09	D101	10/14/1994	Active	aburke@webfoot.com	

The system displays only the records you selected. Notice that the text below the icons displays **Custom Selection** to alert you that you are viewing a list of students you filtered.

Important: Your list page (in this case the Student List) should display only the records you want to perform a function for or that you want to include on a report. If you only select checkboxes for a few records and then run a report without clicking **Show Selected**, the report runs for all records – not just those you selected.

Omit Selected

Use the **Omit Selected** option to narrow down the group of records you need to view or work with just this one time.


Use **Omit Selected** when you only need to remove a small portion of the records you are currently viewing. Use **Show Selected** when you only need to keep a small portion of the records you are currently viewing.

To return to viewing the entire list, click the **Filter** menu , and click **All Records**.

Note: If there is a group of records that you work with regularly, it makes sense to create a query or snapshot of those records instead.

To use the 'Omit Selected' option:

1. Go to any list page, such as the Student List:

Pages School Student Staff Attendance Conduct Grades Assessment Schedule Global									
Options Reports Help									
Student List									
Details		1: Adkerman, James		0 of 760 selected 				Primary Active Students	
	<input type="checkbox"/>	Name	LASID	SASID	Grade	Homeroom	DOB	EnrStatus	Email 1
Contacts	<input type="checkbox"/>	Adkerman, James	293479	1345564569	11	C107	8/19/1992	Active	jadkerman@comcast.com
Attendance	<input type="checkbox"/>	Adam, Monique	208544	1302499311	11	E207	1/20/1993	Active	madam@blueyonder.com
Conduct	<input type="checkbox"/>	Adams, Tyler	297230	1652226004	12	D107	7/10/1991	Active	tlewis@worldmail.com
Transcript	<input type="checkbox"/>	Aldoriso, Mingle	232039	1172991282	10	4	11/13/1993	Active	maldoriso@eudora.com
Assessments	<input type="checkbox"/>	Allen, Diana	208672	1129254645	09	E107	12/26/1993	Active	dallen@aol.com
Schedule	<input type="checkbox"/>	Alper, Heather	248235	1062556430	11	C208	11/15/1993	Active	halper@blueyonder.com
Membership	<input type="checkbox"/>	Amico, Elaine	244040	1304051361	12	B206	9/20/1991	Active	epilla@hotmail.com
Transactions	<input type="checkbox"/>	Amico, Joseph	208314	1215480988	11	H201	1/2/1993	Active	jamico@eudora.com
Documents	<input type="checkbox"/>	Amico, Timothy	241387	1062645502	09	GYMA	1/14/1995	Active	tamico@eudora.com
Snapshots	<input type="checkbox"/>	Anderson, Isabella	283490	1260305854	09	B105	5/12/1995	Active	ipost@earthlink.com
	<input type="checkbox"/>	Anderson, Lee	260687	1208266062	10	D114	2/24/1994	Active	lvenkatesh@earthlink.com
	<input type="checkbox"/>	Anderson, Margaret	238301	1395487850	11	C108	8/20/1992	Active	manderson@comcast.com
	<input type="checkbox"/>	Anderson, Rose	265264	1188397751	12	C108	5/3/1992	Active	randonson@eudora.com

2. Select the checkboxes next to the names of the students you *do not* want to view.

Note: The number of records you selected appears in the record counter

40 of 760 selected . To quickly deselect these records, click the **Eraser** icon .

3. From the **Options** menu, click **Omit Selected**:

Pages School Student Staff Attendance Conduct Grades Assessment Schedule Global									
Options Reports Help									
Student List									
1: Ackerman, James 0 of 720 selected Custom Selection									
	Name	LASID	SASID	Grade	Homeroom	DOB	Enr Status	Email 1	
<input type="checkbox"/>	Ackerman, James	293479	1345564569	11	C107	8/19/1992	Active	jackerman@comcast.com	
<input type="checkbox"/>	Adam, Monique	206544	1302499311	11	E207	1/20/1993	Active	madam@blueyonder.com	
<input type="checkbox"/>	Adams, Tyler	297230	1652226004	12	D107	7/10/1991	Active	tlevits@worldmail.com	
<input type="checkbox"/>	Aldoriso, Mingle	232039	1172991282	10	4	11/13/1993	Active	maldoriso@eudora.com	
<input type="checkbox"/>	Allen, Diana	208672	1129254645	09	E107	12/26/1993	Active	dallen@aol.com	
<input type="checkbox"/>	Alper, Heather	248235	1062556430	11	C206	11/15/1993	Active	halper@blueyonder.com	
<input type="checkbox"/>	Amico, Elaine	244040	1304051361	12	B206	6/20/1991	Active	epilla@hotmail.com	
<input type="checkbox"/>	Amico, Joseph	205314	1215480988	11	H201	1/2/1993	Active	jamico@eudora.com	
<input type="checkbox"/>	Amico, Timothy	241387	1062645502	09	GYMA	1/14/1995	Active	tamico@eudora.com	
<input type="checkbox"/>	Anderson, Isabella	283490	1260305854	09	B105	5/12/1995	Active	ipost@earthlink.com	
<input type="checkbox"/>	Anderson, Lee	260687	1208266062	10	D114	2/24/1994	Active	lvenkatesh@earthlink.com	
<input type="checkbox"/>	Anderson, Margaret	236301	1395487850	11	C108	6/20/1992	Active	manderson@comcast.com	
<input type="checkbox"/>	Anderson, Rose	255264	1188397761	12	C108	5/3/1992	Active	randerson@eudora.com	

The system displays all of the records, except for the ones you selected. Notice that the text below the icons displays *Custom Selection* to alert you that you are viewing a list of students you filtered.

Important: Your list page (in this case the Student List) should display only the records you want to perform a function for or that you want to include on a report. If you only select checkboxes for a few records and then run a report without clicking **Omit Selected**, the report runs for all records – including those you selected.

Send Email

Whenever you are on a person-based list in Aspen, such as the Student List or Staff List, you can send:

- a mass email to everyone on the list
- an email to a selected group on the list
- an email to one person on the list

Note that you can also send reminders, announcements, and alerts via text using the free Follett Notifications app.

To send an email from a person-based list:

1. Go to the list containing the records of the people you want to send the email message to.

Note: You can narrow down this list of records by using **Show Selected**, **Omit Selected**, a query, a filter, or a snapshot. Note the number of records in the record counter.

2. From the **Options** menu, click **Send Email**. The Mass Email dialog box appears:

Basic Navigation

From: joe.administrator@aspenschools.org

To:

Aaronson, Edward	✕	Abbott, Bonny	✕	Abelson, Ali	✕	Abbott, John	✕
Aaronson, Grace	✕	Abela, David	✕				

Students Contacts Teachers Total Recipients: 6

Cc:


Subject:

Attachment:

Navigation icons: back, forward, home, search, print, refresh, stop, zoom in, zoom out, source, print icon

Font: [dropdown] Size: [dropdown] [color picker] [font color] **B** *I* U [bulleted list] [numbered list] [link] [unlink] [table border] [table border]

3. Use the following table to fill in the fields:

Field	Description
From	This address is the primary email address listed in your user preferences.
To	The names of the recipients who will receive the message appear.
Students	Use these checkboxes to select or deselect students, their first emergency contacts, and their teachers as recipients of the email. <div style="background-color: #4F81BD; color: white; padding: 10px; margin-top: 10px;"> <p>Note: Within a subset of email addresses, you can delete a particular address by clicking the x in the corner. The Total Recipients number updates accordingly.</p> </div>
Contacts	
Teachers	
Subject	Type a subject for your email message.
Attachment	If you want to attach a file to your message, click Browse to navigate to the file you want to send.
Text box	Type your message inside the text box. A rich text editor provides the following formatting options: <ul style="list-style-type: none"> • Font • Font size • Formatting, including bold and italics, bullets and numbering • Color • Hyperlinks and images <div style="background-color: #4F81BD; color: white; padding: 10px; margin-top: 10px;"> <p>Note: To insert an image, click the Image icon . In the URL field, copy and paste the URL of the image. Then click OK.</p> </div>

4. Click **Send**. Aspen asks if you are sure that you want to send this message.
5. Click **Yes** or **No**. If you click yes, a progress meter appears.

Note: There are only two direct recipients of your email message — the sender and the district's incoming email address. Everyone else on the list is blind carbon copied (Bcc'd). If you would like a copy of the message, you need to type your email address in the **Cc:** field.

View History of Changes to a Field

With the appropriate user role privileges, you can view the history of changes to a field on a detail page.

To view the change history:

1. On the detail page, go to the **Options** menu and select **Change History**.
2. Click the drop-down to select one of the following to view the change history of fields on the detail page from:
 - Today
 - Yesterday
 - This week
 - Last week
 - This month
 - All records
3. After viewing the history, click **Close**.

Initiate a Workflow

There are several ways to initiate a workflow. Access workflows in whatever method is most efficient for you.

- From the **Tasks** widget on your Home or other Pages
- From the Special Education view
- From the **Options** menu

To initiate a workflow from the Options menu:

Note: If you don't see **Initiate Workflow** on the **Options** menu, contact your Aspen system administrator.

1. Log on to the Staff view
2. Go to the **Options** menu, and select **Initiate Workflow**. The Initiate Workflow wizard displays Step 1.
3. Select the workflow you want to begin.

Example

*If you are reporting a conduct incident, select the **Conduct Referral** workflow.*

4. Type the date or click  to select the date.

Note: The remaining fields are specific to the task/workflow you select to initiate.

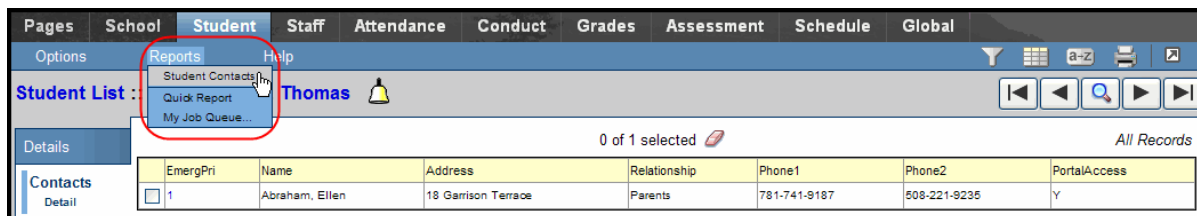
5. Click **Next**. The wizard displays Step 2.

Note: The fields on this step are specific to the task/workflow you have selected.

- Click **Next**. The wizard displays Step 3.
- Confirm the information, and click **Finish**. The workflow now appears in the Tasks area for any user who is listed as a participant in the next phase of the workflow.

Using the Reports Menu

Use the **Reports** menu to run reports associated with the current page:



The **Reports** menu options change on every page. For example, the **Reports** menu on the **Student** tab's **Contacts** side-tab contains *Student Contacts*. If you click the **Enrollment** side-tab, *Quick Report* is the only **Reports** menu option.

Enter Parameters When Running Reports

When you run reports in Aspen, you view them on-screen before you send them to a printer. This way, you can verify that the report contains the data you want in the appropriate format.

To enter parameters when running reports:

- After you click a report name on the **Reports** menu, the dialog box for that report appears.

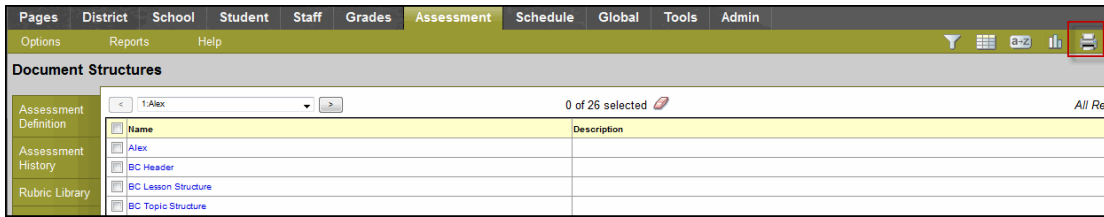
Note: Parameters vary from report to report, but generally require a date range, sort order, and output format.

- Type the date range for the report, or click the calendars to select the dates.
- Select how you want the report to sort the results.
- Select one of the following report formats:
 - **Adobe Acrobat (PDF)**
 - **Web Page (HTML)**
 - **Microsoft Excel (XLS)**
 - **Comma-separated values (CSV)**
- Click **Run**. The system displays the report in the format you select.
- Check the results of the report. Then, print it.

Using Quick Reports/Quick Print

Use the Quick Print menu on list pages to quickly create reports to capture information about the list of records you are viewing in a printable format:

Basic Navigation



Using the Quick Print menu, you can create two types of reports:

- A Quick Print, which is a *Simple* Quick Report that instantly prints the list of records you are viewing in a formatted report.

To generate a *Simple* Quick Report (known as a [Quick Print](#)), click the **Printer** icon. Select an output format, such as **Web Page (HTML)**, and your Quick Print appears:

Student List - All Active Students									
Name	SASID	LASID	H1N1	EnrStatus	Grade	Homeroom	HR Teacher	DOB	Email 1
Ackerman, James	1345564569	293479	N	Active	11	C107	Wilson, A	8/19/1992	jackerman@comcast.com
Adam, Monique	1302499311	206544	N	Active	11	E207	Deang, C	1/20/1993	madam@blueyonder.com
Adams, Tyler	1652226004	297230	N	Active	12	D105	Baker, A	7/10/1991	tadams@gmail.com
Aldoriso, Mingle	1172991282	232039	N	Active	10	D103	Baum, H	11/13/1993	maldoriso@eudora.com
Allen, Diana	1129254645	208672	N	Active	09	E107	Sjolie, E	12/26/1993	dallen@aol.com
Alper, Heather	1062556430	248235	N	Active	11	E101	Weisz, J	11/15/1993	halper@blueyonder.com
Amico, Elaine	1304051361	244040	N	Active	12	B205	Ambrose, A	6/20/1991	epilla@hotmail.com
Amico, Joseph	1215480988	205314	N	Active	11	A101	Medwar, D	1/2/1993	jamico@eudora.com
Amico, Timothy	1062645502	241387	N	Active	09	E201	Brandy, H	1/14/1995	tamico@eudora.com
Anderson, Isabella	1260305854	283490	N	Active	09	B105	Bowers, J	5/12/1995	ipost@earthlink.com
Anderson, Lee	1208266062	260687	N	Active	10	D104	Holland, K	2/24/1994	venkatesh@earthlink.com
Anderson, Margaret	1395487850	236301	N	Active	11	D201	Liu, K	6/20/1992	manderson@comcast.com
Anderson, Rose	1188397751	255264	N	Active	12	D201	Liu, K	5/3/1992	randerson@eudora.com
Anderson, Taylor	1038939046	231707	N	Active	10	A204	Barr, D	1/18/1994	thoulgate@aol.com
Anderson, Zachary	1360247593	213726	N	Active	10	E102	Wilson, A	11/28/1993	zimsong@webfoot.com
Antuna, Erika	1330258775	272189	N	Active	11	M101	Gordon, J	11/24/1992	ejolicoeur@earthlink.com
Arakelian, Andrew	1090613445	254713	N	Active	10	B205	Ambrose, A	11/17/1993	agannaway@webfoot.com
Arakelian, James	1048595505	210338	N	Active	09	E207	Deang, C	5/20/1995	jarakelian@msn.com

- A Quick Report, which is an on-the-fly report of the information you are viewing on a list page. You decide what's on it, and the system formats it to look professional.

There are four types of Quick Reports:

- **Simple:** Produces a list of the records and fields you select to include
- **Detail:** Produces a page for each record, and the report aligns the data fields vertically instead of horizontally
- **Group:** Groups records by the fields you select, such as homeroom
- **Summary:** Hides individual records from the list and produces a list of cumulative values based on the records

To create a Quick Report, click the **Printer** icon, and click **Create Quick Report**. The Quick Report wizard appears and walks you through the steps of creating the report you need.

Generate a Quick Print Using the Printer Icon

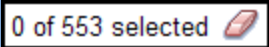
You can generate a Quick Print using the **Quick Print** icon  in the menu bar on any list page. Clicking this icon once is the same as going to the **Options** menu, clicking **Quick Report**, and selecting the Simple report type.

Or, to create a different type of Quick Report, click the **Quick Print** icon and then select **Create Quick Report** to go directly to the Quick Report wizard.

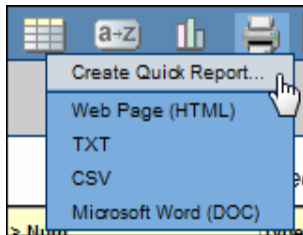
To generate a Quick Print using the Quick Print icon:

1. Go to the list page containing the type of data you want to report on.
2. Select the records you want to include on the report.
3. On the **Options** menu, click **Show Selected**.

Important: Quick Prints include any records that appear on the current list

 (in this example, 553). Use a filter, query, snapshot, or custom selection to limit the number of records to include in your Quick Print.


4. Click the **Quick Print** icon  in the menu bar. The menu expands:




5. Click one of the following format options:
 - **Web Page (HTML):** to view the information in an HTML file.
 - **CSV:** to view the information in a text file that separates each field with a comma. If saved, the file will have a .CSV extension
 - **TXT:** to view the information in a text file that separates each field with a comma. If saved, the file will have a .TXT extension.

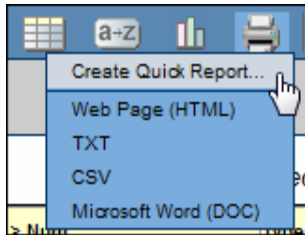
Note: The two comma-separated values formats (CSV and TXT) create identical files; the only difference is the file extension. Some Web browsers only handle one extension properly.

6. **Microsoft Word (DOC):** to view the information in a Word document. The data appears in a table, which has all the available options for borders and shading.
7. To print the report, do one of the following:

- From your browser window or dialog box, go to **File > Print**.
- From Microsoft Word, click the **Office Button**  and then click **Print**.

To generate a detail, summary, or group Quick Report using the Quick Print icon:

1. Go to the list page containing the type of data you want to report on.
2. Select the records you want to include on the report.
3. On the **Options** menu, click **Show Selected**.
4. Click the **Quick Print** icon  in the menu bar. The menu expands:



5. Click **Create Quick Report** to open the Quick Report wizard.

Generate a Quick Report Using the Reports Menu


Use a Quick Report to create an on-the-fly report of the information you are viewing on a list page. You decide what's on it, and the system formats it to look professional.

If there is a particular report that you run every week, such as an attendance report, creating and saving a Quick Report means that you only have to set up the formatting once. Then, every time you run the report it will look the way you want it to.


For example, maybe you like to shade every other line for easier reading and set up the report to pull statistics such as boy totals and girl totals per attendance category. If you save your Quick Report and run it each week, the formatting will look the same, but the information on the report will vary based on the data in the system.

Other users in your school and district can create and share Quick Reports. Before creating your own Quick Report, you might want to check the saved reports to see if it already exists.

Before starting to create your Quick Report, get your list page (such as the Student List) showing the fields and records that you want to include. This minimizes the setup time in the Quick Report wizard.

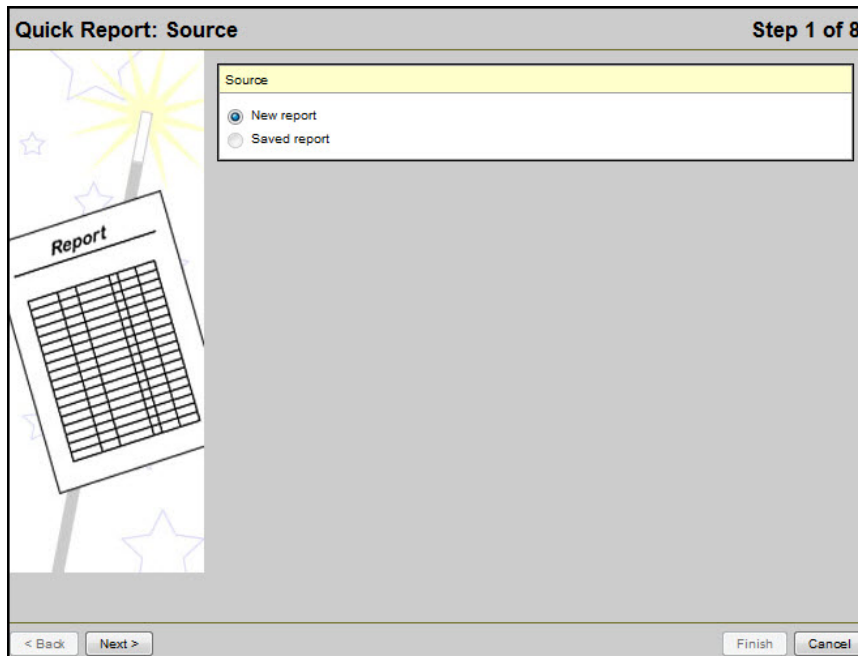
Important: Quick Reports include any records that appear on the current list  (in this example, 763). Use a filter, query, snapshot, or custom selection to limit the number of records to include in the Quick Report.

The Quick Report wizard contains eight steps, but only the first four are required. The others let you customize the report's format and design. If you prefer, you can do the formatting in Excel.

Note: You can also create a Quick Report from the **Quick Print** menu. If you just want to print the information on your screen, click the **Quick Print** icon  and then go directly to selecting an output format, such as **Web Page (HTML)**.

To generate a Quick Report from the Reports menu:

On the **Reports** menu, click **Quick Report**. The Quick Report wizard appears:

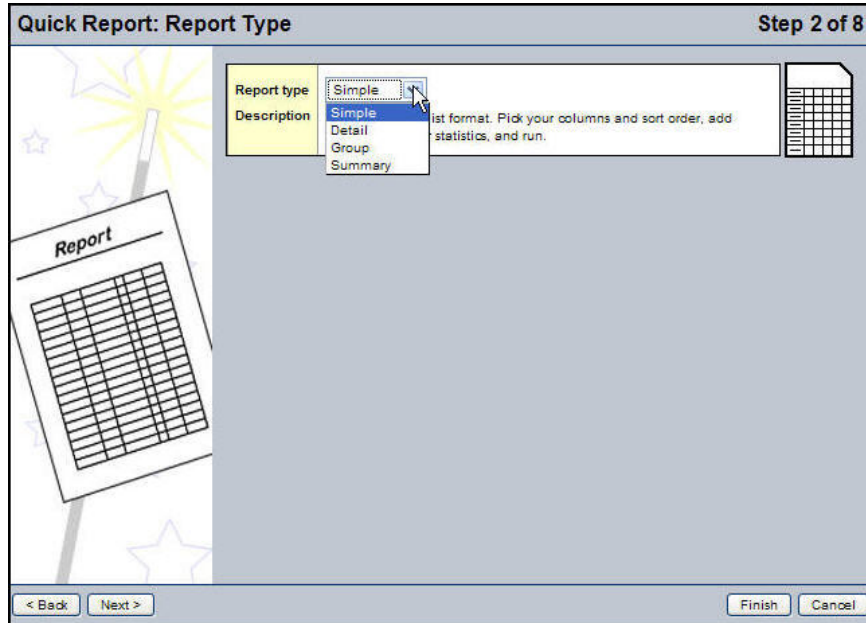


The Quick Report wizard has eight steps:

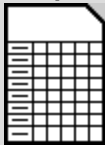

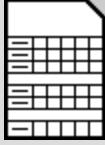
Step 1: Source


1. Do one of the following to determine if you want to create a new Quick Report or use one that's been saved:
 - Select **New report** to create a new report.
 - Select **Saved report** to use a report you or another user previously created. The page displays a list of the reports available to you. You can click **Finish** to immediately print the report without making any changes.
2. Click **Next**.

Step 2: Report Type



1. Click the **Report type** drop-down to select the type of report you want to run:

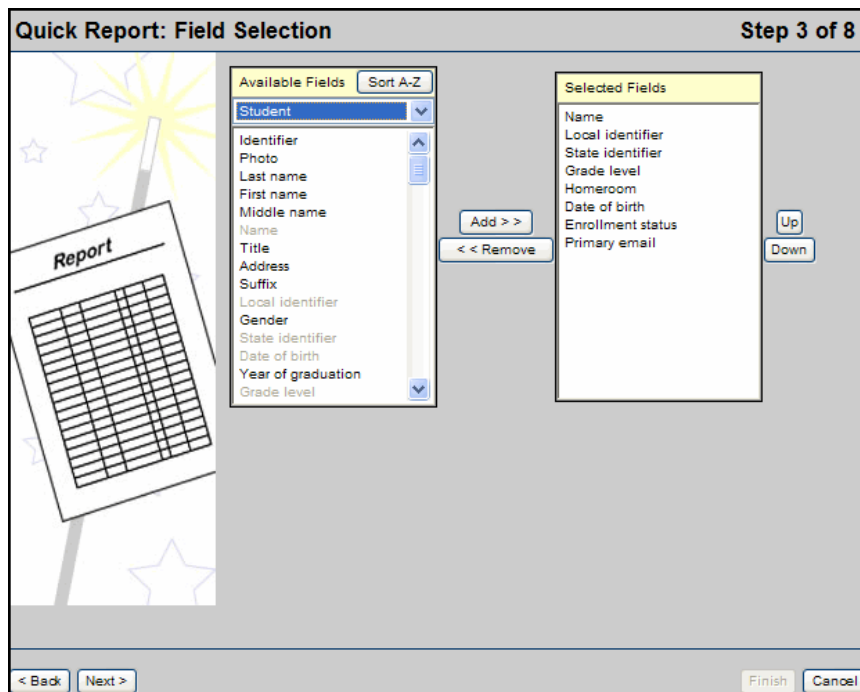
Type	Description
<p>Simple</p> 	<p>The Simple Quick Report produces a list of the records and fields you select to include. You select the columns and sort order. You can also add totals or statistics, which appear in a summary table below the list of records.</p> <p>Example: The school nurse wants a list of all eleventh and twelfth graders sorted by grade level, then homeroom.</p>
<p>Detail</p> 	<p>The Detail Quick Report produces a page for each record, and the report aligns the data fields vertically instead of horizontally.</p> <p>For example, when running a Detail Quick Report on a student-based list, each student record appears on a separate page, with the fields you select as the rows.</p> <p>Example: A new guidance counselor is starting and would like a list of his students with basic demographic information, as well as a photo, to put in each student's profile folder. Plus, he wants to know how many boys and girls he's been assigned.</p>
<p>Group</p> 	<p>The Group Quick Report groups records by the fields you select. For example, on a Student List you can group records by homeroom.</p> <p>After you select Group, Step 3 displays the fields available to group records by. Then, on Step 5, you can include page breaks as well as calculate totals by group. For example, use Group Quick Reports to print homeroom or bus lists.</p> <p>Example: The new school year is starting, and you need to pull together homeroom lists for the homeroom teachers that also show the number of students in each room.</p>

Type	Description
<p>Summary</p> 	<p>The Summary Quick Report hides individual records from the list and produces a list of cumulative values based on the records.</p> <p>Use this report to print totals and other statistical reports.</p> <p>After you select Summary, Step 3 displays the fields available to produce values for. Then, on Step 5, you can include page breaks, as well as calculate totals.</p> <p>Example: The principal would like to know, for each course, how many sections are offered and what is the average enrollment for the course.</p>
<p>Notes: The Group and Summary Quick Reports are the same, except the Group report shows individual records and totals and the Summary report only shows totals.</p>	
<p>Notes: When you select a report type, a description of the report type and a visual representation of it appears to the right.</p>	

Note: If you selected the Group or Summary report type, you need to make your group type selection. See Step 3: Field Selection for instructions.

2. Click **Next**.


Step 3: Field Selection



1. Select the fields you want to include on the report and the order you want them to appear in.

Note: Fields are organized by table. When the Student table is selected, fields in that table, such as **Name** and **Grade level**, appear below. If you do not see the field you are looking for, click the drop-down arrow to select a different table.

2. Highlight a field in the **Available Fields** column, then click **Add** to add the field to the **Selected Fields** column. To select several fields next to each other, press **SHIFT** and the **Up** or **Down** arrow on your keyboard to select the fields. To select several fields together that do not appear next to each other, press **CTRL** while you click each field you want to include.

Note: Fields in the **Available Fields** column for each table are listed from most commonly used to least commonly used. To display the fields in alphabetical order, click the **Alpha Sort** button .

Note: Sort the fields in the **Selected Fields** column to appear in the order you want them on the report. The first field in the **Selected Fields** column is the first field to appear for each record on the report. Highlight a field, and click **Up** or **Down** to move it.

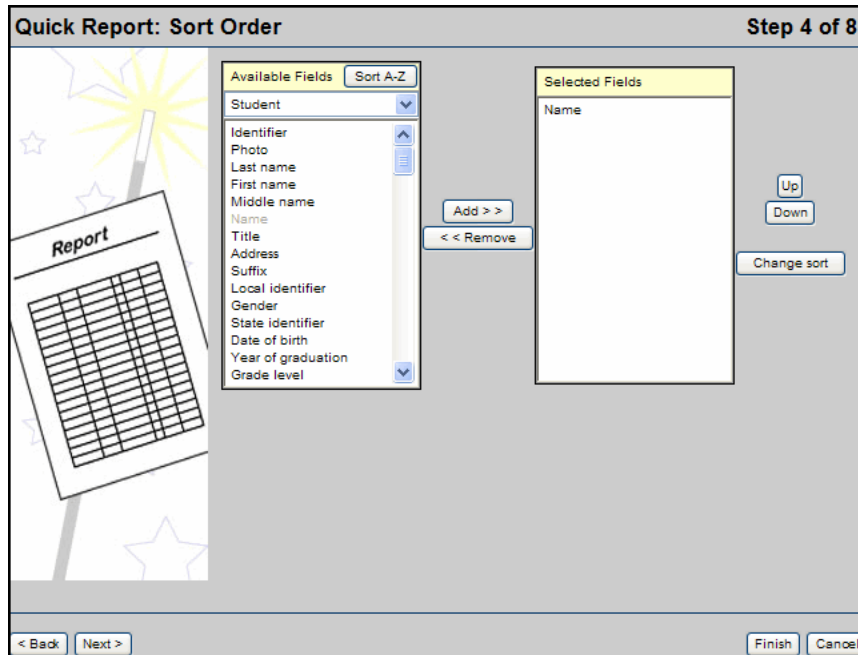
Note: If you are creating a new Quick Report, the **Selected Fields** column displays all fields in the current field set by default. If you are running a saved Quick Report, the **Selected Fields** column displays the fields previously selected for this report.

To remove a field from the **Selected Fields** column, highlight it, and click **Remove**.


3. Click **Next**.

Step 4: Sort Order

Note: Steps 4-8 are optional for formatting. If you are not concerned about your report's appearance, you can click **Finish** now.



1. To determine how the system sorts the overall report, such as which records print first, do the following:
2. In the **Available Fields** column, highlight the field you want the system to use to sort the report by, and click **Add** to move the field to the **Selected Fields** column. You can continue to select fields and add them below the primary sort.

Note: Fields in the **Available Fields** column for each table are listed from most commonly to least commonly used. To display the fields in alphabetical order, click the **Alpha Sort** button .

3. In the **Selected Fields** column, highlight the fields and click **Up** and **Down** to determine the sort order (the field that appears first in the column is the primary sort, then the secondary sort, and so on).
4. Click **Next** to continue with setting up grouping and formatting options (optional). Or, click **Finish** to run your report.

Step 5: Totals and Statistics

Quick Report: Totals and Statistics Step 5 of 8

Totals

Group	Total Count	Page Break
Overall	<input type="checkbox"/>	<input type="checkbox"/>
Year of graduation	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Statistics

Name:

Field	Function	Reset By
Home language	MAX	Group: Year of graduation <input type="button" value="X"/>
Name	MAX	Group: Year of graduation <input type="button" value="X"/>

< Back

1. In the **Totals** section, to include totals of records on the report, select the **Total Count** checkbox next to the group.

Note: If you select the **Group** report type in Step 2, the report can also include totals by any of the groups you defined in that step. Then, select the **Page Break** checkbox if you want the report to start on a new page after each group and its totals appear.

2. In the **Statistics** section, for each field you include on the report, the report can provide the minimum, maximum, and total count of each field. For example, click the drop-down to select **Gender**, click **Add**, and select **COUNT** to see totals of boys and girls. You can also track field averages and sums for numeric fields. Following any statistic selection, if you have selected group by fields, specify exactly when you want that statistic to reset. By default, the statistic will be reset only at the end of the report. If a group field is chosen, the value will be reset at the end of that grouping, allowing you to view group-based statistics.

You can add several statistics and resets for each field.

3. Click **Next**.

Step 6: Format Options

Quick Report: Format Options Step 6 of 8

Header

Report title: GPA Report

Print date:

Body

Format: Web Page (HTML) ▼

Font face: Arial ▼

Font size: Medium ▼

Grid lines: Horizontal & Vertical ▼

Shade alternate lines:

< Back Next > Finish Cancel

1. Use the following table to enter information in the fields:

Field	Description
Report title	Type a title for the report.
Print date	Select the Print date checkbox if you want the report to print the current date.
Format	<p>Select one of the following:</p> <ul style="list-style-type: none"> • Web Page (HTML) to view the information in an HTML file. • Comma-separated values (CSV) to print the information in a text file that separates each field with a comma. The file will be saved with a .CSV extension. • Comma-separated values (TXT) to print the information in a text file that separates each field with a comma. The file will be saved with a .TXT extension. <p>Note: The two comma-separated values formats (CSV and TXT) create identical files; the only difference is the file extension. Some Web browsers only handle one extension properly. Use the extension that works for your browser.</p>
<p>Note: Some of the following options are only available for specific formats.</p>	
Font face	Select the font you want the report to print in.
Font size	Select the font size of the report.
Grid lines	Select the type of grid lines (vertical, horizontal, or both), if any.
Shade alternate lines	Select this checkbox if you want the report to shade every other line for easier viewing.

2. Click **Next**.

Step 7: Field Format Options

Quick Report: Field Format Options Step 7 of 8

Field: Name

Title: Name

Custom Width

Number of characters: []

Overflow handling: Wrap

Font face: Arial

Font size: Medium

Bold:

Italic:

Underline:

< Back Next > Finish Cancel


1. For each field that displays on the report (the columns of information that appear), you can define a custom width in number of characters, and specific font and text effects.

Note: If you include a field that contains a large amount of text, you can define the number of characters to display. Then, you can select a value at the **Overflow handling** field. For example, if you select **Wrap**, any text after the custom width appears on the next line of the report.

2. Click **Next**.

Step 8: Save Options

1. Use the following table to enter information in the fields:


Field	Description
Save Options	<p>Select one of the following in the Save Options box:</p> <ul style="list-style-type: none"> • Select Don't save if you do not want to save the report parameters you just selected. When you click Finish, if you like the report that appears, you will have to go through the wizard again to recreate it. • Select Save to save any changes you made to an existing saved report. • Select Save as to save the parameters you entered as a new Quick Report.
Name	If you selected Save as , type a name for the report (this is the report's file name, not its title).
Owner Type	Select the type of report (User, School, Intermediate Organization, or District). The options available to you depend on the view you are logged into and your privileges.
Owner Name	Click  to change the name of the report's owner.

2. Click **Finish**. The report displays the information in the format you selected.

Use Quick Letters

Use the Quick Letters feature to quickly create and customize attendance, conduct, or grade-related letters from any student list page for students meeting a given set of criteria. You can then print these letters as one print job and mail them to the students or their parents/guardians.

For instance, you might use Quick Letters to create a custom form letter regarding students who have five or more absences so far this semester. The letter would notify parents that their students are in danger of losing course credit. You could also use this feature to create a more general letter for all students informing them of the school attendance policy.

To create a Quick Letter, click the **Quick Letter** icon  on any student list page and complete the Quick Letter wizard. For instructions on completing the Quick Letter wizard, see the "Create a Quick Letter" Help topic.

Create a Quick Letter

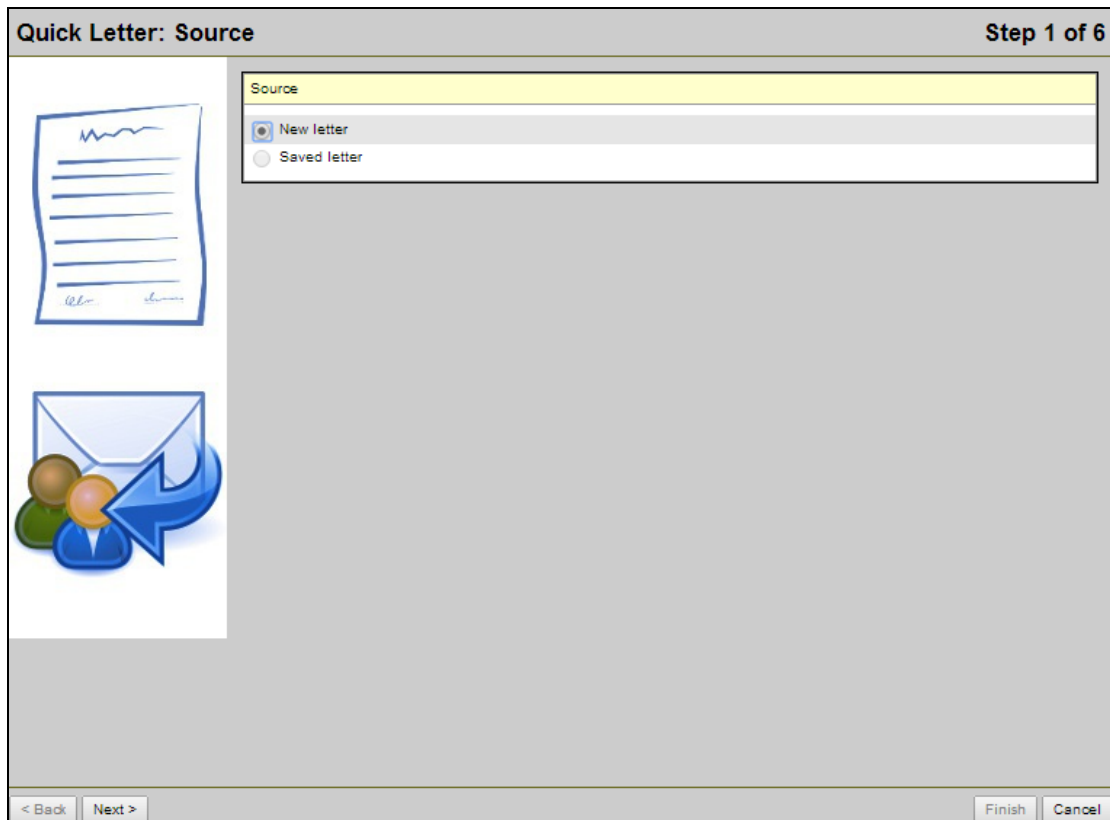
On any student list page, click the **Quick Letter** icon  to access the following options:

- **Create Quick Letter:** Brings up the Quick Letter wizard, which lets you customize your Quick Letter in detail and access saved letters.
- **Attendance:** Brings up a streamlined version of the Quick Letter wizard that begins on the input page for an attendance-related letter.
- **Conduct:** Brings up a streamlined version of the Quick Letter wizard that begins on the input page for a conduct-related letter.
- **Grades:** Brings up a streamlined version of the Quick Letter wizard that begins on the input page for a grades-related letter.

Note: You can access the student list page by clicking the Student tab while logged on to the District, Intermediate Organization, or School view.

To create a Quick Letter:

On any student list page, click  and select **Create Quick Letter**. The six-step Quick Letter wizard appears:



Step 1: Source

Do one of the following:

- **New letter:** Select this option to create a Quick Letter from scratch. Then click **Next**.
- **Saved letter:** Select this option to either resend a saved Quick Letter or use it as the basis for a new letter. A table of saved Quick Letters appears. Select the letter you want to re-create or use as a basis for a new letter. Then either click **Next** to skip to Step 3 and customize your letter, or click **Finish** to re-create the letter without any changes.

Step 2: Letter Type

Quick Letter: Letter Type Step 2 of 6

Letter Type Quick Letter - Attendance ▼

< Back Next > Finish Cancel

1. Click the **Letter Type** drop-down to select the type of Quick Letter you want to create:
 - **Quick Letter – Attendance:** Creates a letter for students who meet certain attendance criteria, such as having four or more absences in the past month.
 - **Quick Letter – Conduct:** Creates a letter for students who meet certain conduct criteria, such as having more than one suspension in the semester so far.
 - **Quick Letter – Grades:** Creates a letter for students who meet certain grades criteria, such as having a GPA less than or equal to 2.0.
2. Click **Next**.




Step 3: Input

Quick Letter: Input
Step 3 of 6

Organization School Start date End date Students to include Search value	Follett Schools Crow Point High School <input type="text" value="8/1/2014"/> <input type="button" value="Calendar"/> <input type="text" value="8/7/2014"/> <input type="button" value="Calendar"/> <input type="text" value="Current selection"/> <input type="button" value="v"/> <input type="text"/>																								
1st criteria section	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Code</th> <th style="text-align: left;">Reasons</th> <th style="text-align: left;">Operator</th> <th style="text-align: left;">Value</th> <th style="text-align: left;">Exclude excused</th> <th style="text-align: left;">Connector</th> </tr> </thead> <tbody> <tr> <td>Absences</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And <input type="button" value="v"/></td> </tr> <tr> <td>Tardies</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And <input type="button" value="v"/></td> </tr> <tr> <td>Dismissals</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And <input type="button" value="v"/></td> </tr> </tbody> </table>	Code	Reasons	Operator	Value	Exclude excused	Connector	Absences	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>	Tardies	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>	Dismissals	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>
Code	Reasons	Operator	Value	Exclude excused	Connector																				
Absences	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>																				
Tardies	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>																				
Dismissals	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>																				
Criteria 2nd criteria section	<table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And <input type="button" value="v"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And <input type="button" value="v"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And <input type="button" value="v"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>0.0</td> <td><input type="checkbox"/></td> <td>And <input type="button" value="v"/></td> </tr> </tbody> </table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	0.0	<input type="checkbox"/>	And <input type="button" value="v"/>																				

- Use the following table to enter information in the fields:

Note: Some fields appear only for attendance, conduct, or grades-related Quick Letters.

Field	Description
Start date (Attendance and Conduct letters only)	Type the start date of the date range you want to search for attendance records or conduct incidents within, or click  and select it from the pop-up.
End date (Attendance and Conduct letters only)	Type the end date of the date range you want to search for attendance records or conduct incidents within, or click  and select it from the pop-up.
Transcript Definition (Grades letters only)	Click  . The Transcript Definition Pick List appears. Select the transcript definition used by the school that the students you want to create a Quick Letter for attend. The fields of this transcript definition become the criteria that you can choose from when determining which students to create the letter for. Click OK .
Students to include	To further limit the set of students who meet your Quick Letter's criteria, select one of the following options: <ul style="list-style-type: none"> • Current selection: Only includes students within the current filter on the student list page. • YOG: Only includes students who have a specific year of graduation. You can specify the YOG at the "Search value" field. • Snapshot: Only includes students who are part of a specific saved snapshot. You can specify the snapshot at the "Search value" field.
Search value	If you selected YOG or Snapshot at the "Students to include" field, type the specific YOG or snapshot name you want to restrict your search to.
Criteria <ul style="list-style-type: none"> • The 1st criteria section includes a selection of preset, common attendance codes (for attendance-related letters) or conduct record types (for conduct-related letters) that you can use as criteria for your letter. • The 2nd criteria section lets you select other attendance codes or additional instances of conduct record types as criteria from drop-downs. 	
<p>Note: Grades-related letters do not have a 1st criteria section, since the transcript definition fields you use as criteria vary depending on the transcript definition you select.</p>	
Code (Attendance letters only)	To include other attendance codes in your criteria than those listed by default in the 1st criteria section — Absences, Tardies, and Dismissals — select those codes from the drop-downs in the 2nd criteria section.
Type	To include more instances of the conduct record types listed by

Field	Description
(Conduct letters only)	<p>default in the 1st criteria section — Incidents and Actions — in your letter's criteria, select those types from the drop-downs in the 2nd criteria section.</p> <p>For example, you might want to create a Quick Letter for students who have either more than one suspension or more than four detentions in a date range. In this case, you would need to have two Incidents rows, one for suspensions and one for detentions.</p>
Fields (Grades letters only)	Click the drop-downs to select the transcript definition fields you want to use as criteria.
Reasons (Attendance letters only)	<p>To restrict your criteria to include only students who have an attendance code paired with a specific reason, select the reason from the drop-down.</p> <p>For example, to create a Quick Letter for students who had absences due to illness, in the Absences row, select Sick (or another value) from the Reasons drop-down.</p>
Code	To restrict your criteria to include only students with a specific type of conduct incident or action, select the appropriate code from the drop-down.
Operator	<p>To restrict your criteria to include only students with a certain number or range of attendance codes, conduct records, or grades-related criteria, select the appropriate numerical operator from the drop-down.</p> <p>For example, to create a Quick Letter for students who had one or more suspensions in a date range, you would select Greater than or equal to as an operator and type 1 in the Value field.</p> <div style="background-color: #e6f2ff; padding: 10px; border: 1px solid #0056b3;"> <p>Note: If you leave the Operator and Value fields blank, the letter's criteria will include all students who have any value in their student record for the attendance code, conduct record type, or transcript definition field defined in that row.</p> <p>For example, say you want to create a generic letter to all students detailing the school's attendance policy. You could create an attendance-related Quick Letter, and leave the Operator and Value fields blank in the Absences, Tardies, and Dismissals rows. This would include students who have any value, including none, for those fields in their attendance records.</p> </div>
Value	If you selected an operator to restrict your criteria to include only students with a certain number or range of attendance codes,

Field	Description
	conduct records, or grades-related criteria, type the value modified by that operator.
Exclude excused (Attendance letters only)	Select this checkbox to exclude from your criteria any instances of that row's attendance code that were excused by a teacher or staff member.
Connector	To include multiple criteria, select one of the following connector options from the drop-down: <ul style="list-style-type: none"> • And: Searches for students who satisfy both the criterion defined in that row and the criterion defined in the next row. • Or: Searches for students who satisfy either the criterion defined in that row or the next row.

- Do one of the following:
 - Click **Next** to customize the header for your Quick Letter.
 - Click **Finish** to create the letter using the default or saved header, body text, and options settings.

Step 4: Create Header

Quick Letter: Create Header
Step 4 of 6

body table tbody tr td
▲

Follett Schools

Attendance Letter

Jul 29, 2014

< Back
Next >
Finish
Cancel

Customize the header that appears on your letter using a modified version of Aspen’s rich text editor. For instructions on using the additional tools included in the modified editor, [see Step 5](#).

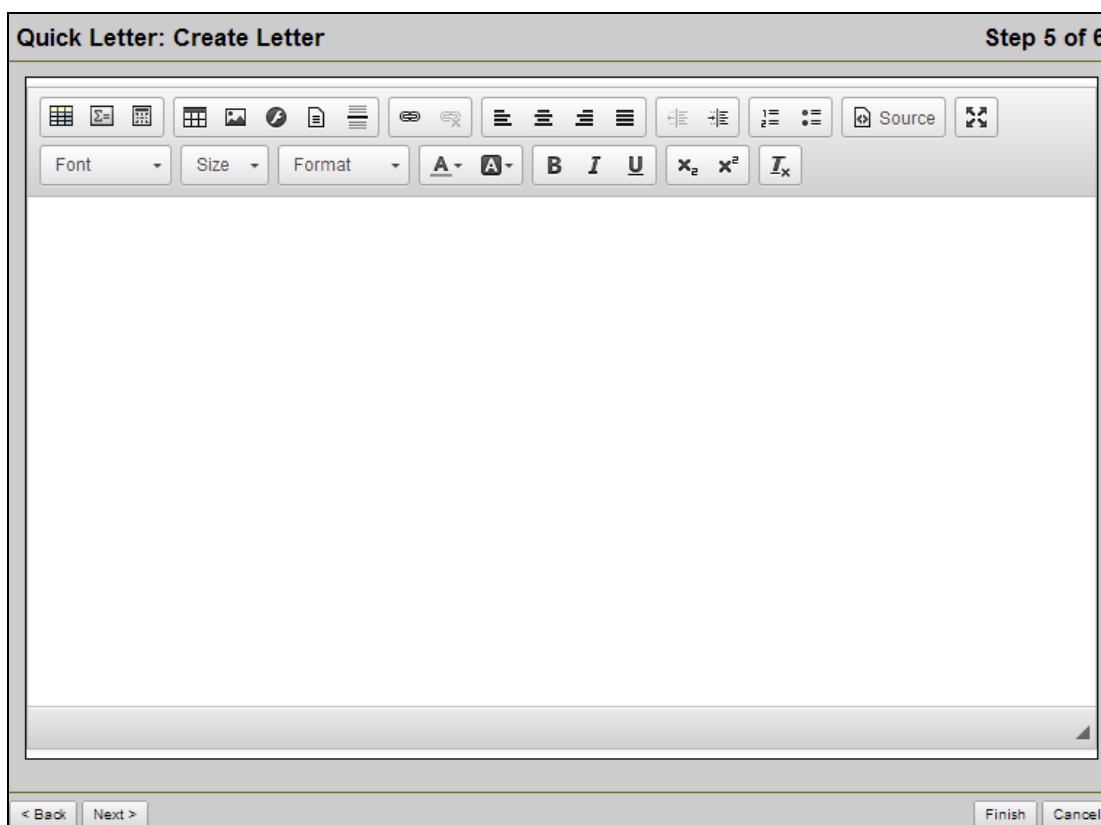
When creating a letter, certain information appears in the header by default. Your district name is displayed in the header’s top-left corner, the school name in the top-right (if you are creating a Quick Letter at the school level), the date in the bottom-right, and the letter type in the center. To customize the default header, do the following:

1. Make your modifications using the rich text editor.

Note: For more information on using Aspen’s rich text editor, see the “Using the Rich Text Editor” Help topic.


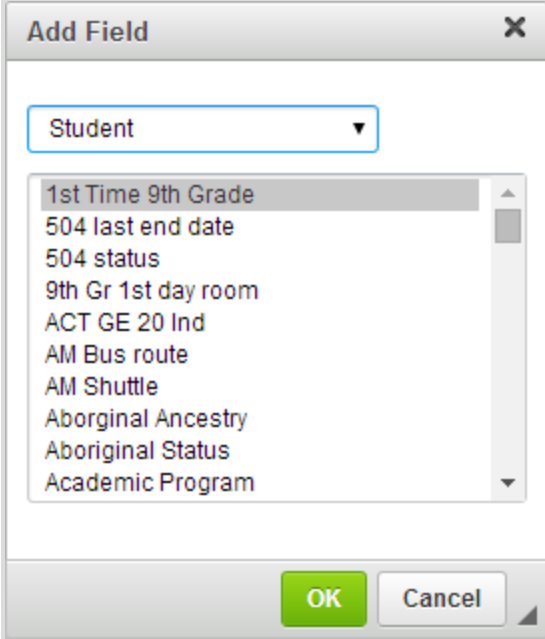

2. Do one of the following:
 - Click **Next** to customize your Quick Letter’s body text.
 - Click **Finish** to create the letter using the default or saved body text and options settings.

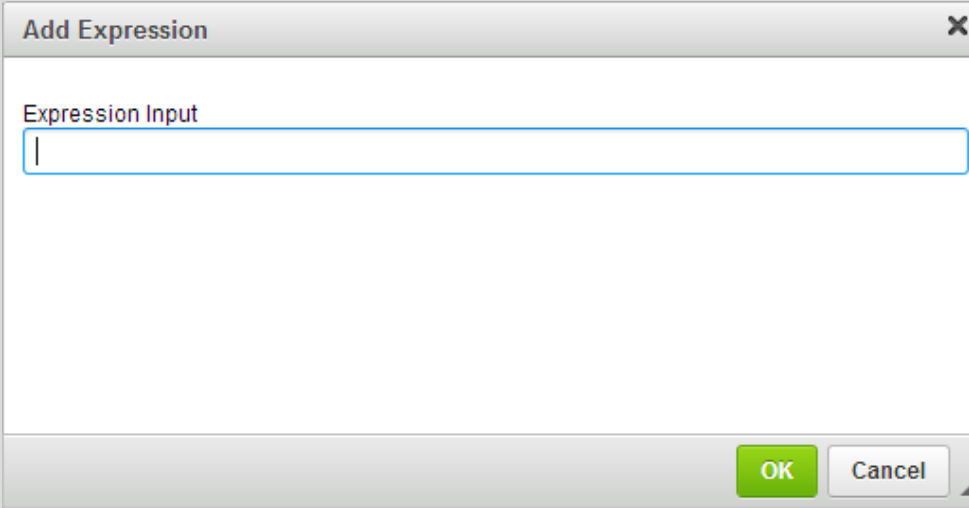

Step 5: Create Letter

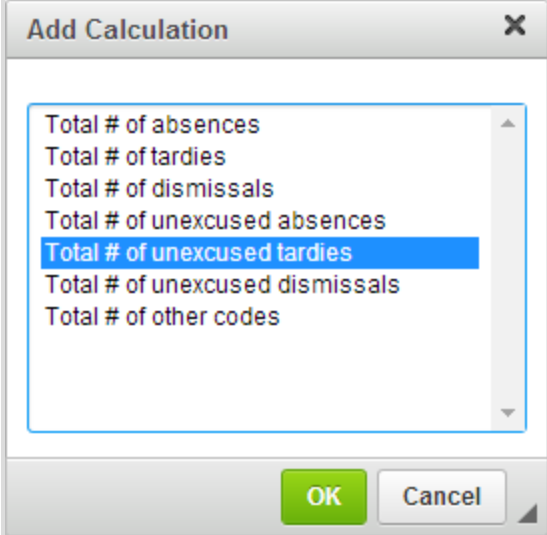


1. Type the body text for your Quick Letter using a modified version of Aspen’s rich text editor.

In addition to the standard text and media editing tools, the modified rich text editor provides three additional tools designed for Quick Letters. Use the following table as a reference for using these tools:

Text Editor Tool	Function
	<p>Field: Use this tool to insert a field, such as “Student name,” into the text box. When you complete the Quick Letter wizard, this field is populated with the appropriate information for each student.</p> <p>To insert a field in your Quick Letter, click the icon. The Add Field pop-up appears:</p>  <p>Click the drop-down to select the appropriate table for your field. For instance, if you want to add a field for the student’s State/Province, you would select the Physical Address table. The pick list refreshes to display all fields in that table. Select the appropriate field, and click OK.</p> <div style="background-color: #e6f2ff; padding: 5px; border: 1px solid #0056b3;"> <p>Note: Table and field names are determined by your Aspen system administrator, and might differ from those shown.</p> </div>
	<p>Expression: Use this tool to insert an expression into the text box. Expressions are variables that call and display information from the student record of each student included in the letter’s criteria. They can also be modified by filters that alter their output.</p> <p>For example, you could use this tool to insert an expression in your letter’s body text that displays a pronoun (“He” or “She”) based on the gender code in the student record.</p> <p>To insert an expression in your Quick Letter, click the icon. The Add Expression</p>



Text Editor Tool	Function
	<p>pop-up appears:</p>  <p>Type the expression in the Expression Input field, and click OK.</p> <div style="background-color: #e6f2ff; padding: 5px;"> <p>Note: The expressions that you can insert using the Expression tool are the same as the variables used in gradebook comments. For more information on these expressions and examples of complete expressions, see the “Create Comments in a Comment Bank” Help topic.</p> </div>
	<p>Calculation: Use this tool to insert a predetermined calculation, such as the student’s total number of suspensions, into the text box. When you complete the Quick Letter wizard, Aspen evaluates this calculation for each student included in the letter’s criteria.</p> <p>To insert a calculation into your Quick Letter, click the icon. The Add Calculation pop-up appears:</p>

Text Editor Tool	Function
 <p data-bbox="467 934 1209 966">Select the appropriate calculation from the pick list, and click OK.</p> <div data-bbox="474 993 1430 1119" style="background-color: #e6f2ff; padding: 5px;"><p>Note: The calculations available to you in the Add Calculation pop-up depend on the type of Quick Letter you are creating.</p></div>	

2. When you are finished customizing your Quick Letter's body text, do one of the following:
 - Click **Next** to adjust the letter's options.
 - Click **Finish** to create the letter using the default or saved options settings.

Step 6: Options

Quick Letter: Options
Step 6 of 6


Options

Don't save
 Save
 Save as

Name	<input style="width: 80%;" type="text"/>
Owner	
Type	<input type="text" value="School"/> ▼
Name	Gary Oaks Secondary SD 73 🔍


< Back
Next >
Finish
Cancel

1. In the Options section, select one of the following:
 - **Don't save:** Aspen does not save the letter. This is the default setting.
 - **Save:** Aspen saves the letter using previously-provided name and owner information. This option is only available when customizing a previously-saved Quick Letter.
 - **Save as:** Aspen saves the letter using the name and owner information you provide in Step 2.
2. If you selected "Save as", use the following table to fill in the letter's name and owner information:

Field	Description
Name	Type a file name for the letter.
Owner	
Type	<p>Click this drop-down to select one of the following, depending on your user privileges:</p> <ul style="list-style-type: none"> • User: Gives a user or yourself access to the letter. • School: Gives users at a school access to the letter. • Intermediate Organization: Gives all users in an intermediate organization access to the letter. • District: Gives all users in the district access to the letter.
Name	<p>Click . A pop-up lists the organizations or users you selected in the Type field that you have access to. Select a specific owner for the letter, and click OK.</p>

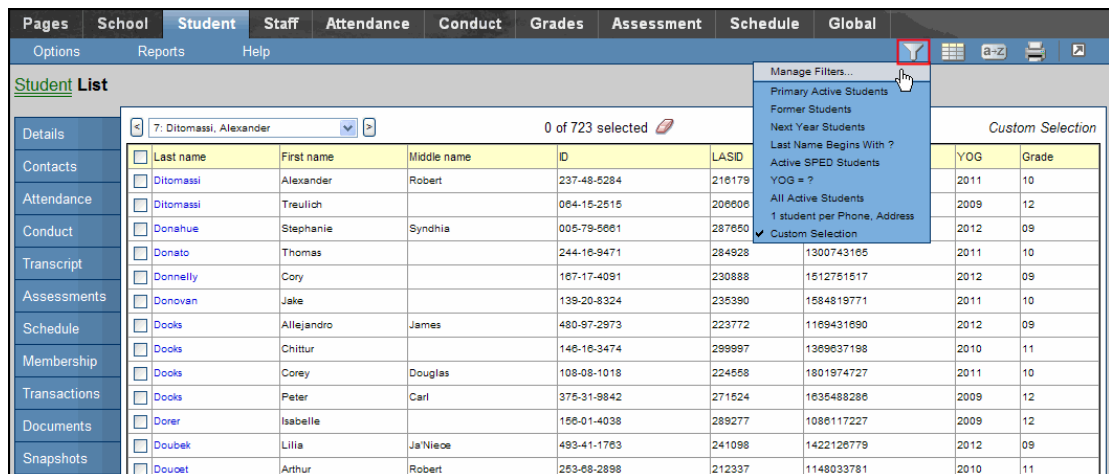
3. Click **Finish**. The letter appears.

Using the Filter Menu

Use the **Filter** menu  to determine the group of records that appears on the page, such as all active students.


In the upper-right corner of each page, click  and select **Manage Filters** to do the following:

- Add a new filter
- Change the order of filters
- Edit a filter
- Copy an existing filter
- Delete a filter



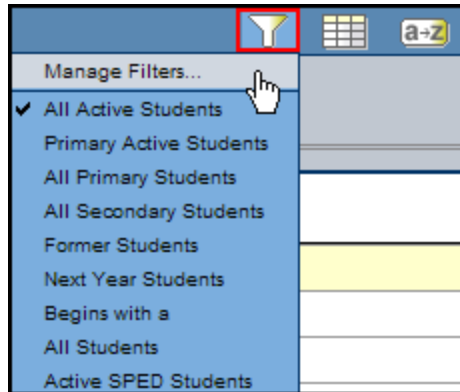
The screenshot shows a software interface with a top navigation bar containing 'Pages', 'School', 'Student', 'Staff', 'Attendance', 'Conduct', 'Grades', 'Assessment', 'Schedule', and 'Global'. Below this is a sub-menu with 'Options', 'Reports', and 'Help'. The main content area is titled 'Student List' and shows a table with 723 records. A search bar at the top of the table contains '7: Ditomassi, Alexander'. A dropdown menu is open in the upper right corner, titled 'Manage Filters...', listing various filter options such as 'Primary Active Students', 'Former Students', 'Next Year Students', 'Last Name Begins With?', 'Active SPED Students', 'YOG = ?', 'All Active Students', '1 student per Phone, Address', and 'Custom Selection'. The table columns are: Last name, First name, Middle name, ID, LASID, YOG, and Grade. The table data includes rows for students like Ditomassi, Treulich, Donahue, Donato, Donnelly, Donovan, Dooks, and Dorer.

Add a Filter

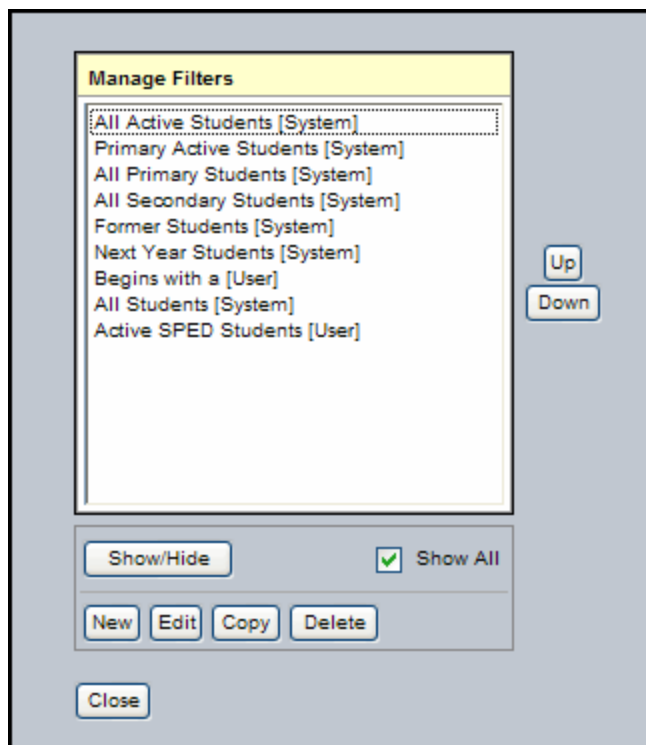
The **Filter** menu  contains a number of default options, such as all active students. You can add your own options to this menu using queries or snapshots that have already been created.

To add a filter to the Filter menu:

1. Go to a list page, such as the Student List.
2. In the upper-right corner of the page, click the **Filter** icon , and then select **Manage Filters**:



The Manage Filters dialog box appears:



3. To add a new filter, click **New**. The Filter Pick List appears:

The screenshot shows a dialog box for configuring filters. It has a yellow header area with the following fields:

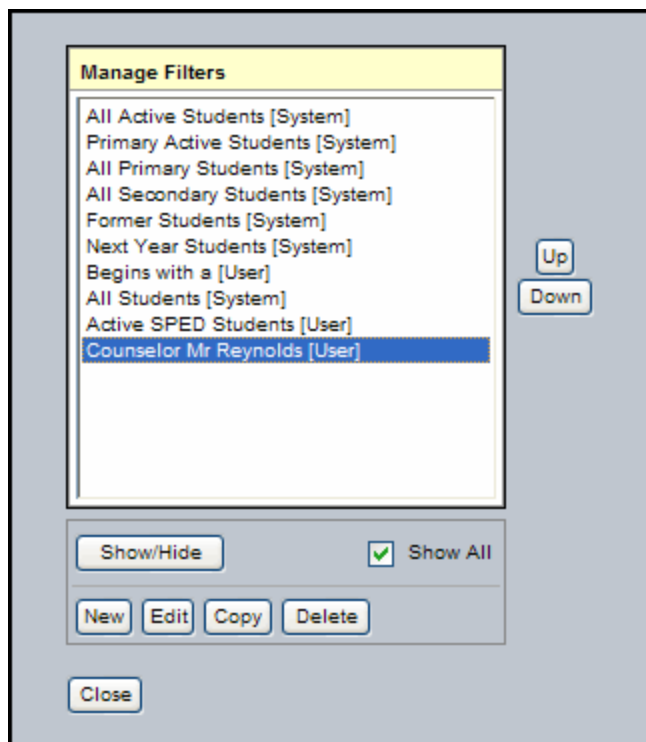
- Name:** 1 student per Phone, Address
- Owner:** Administrator, Joe (dropdown)
- Filter Type:** Saved Query (dropdown)

Below the header is a navigation bar with a left arrow, a dropdown menu showing "1: 1 student per Phone, Address", a right arrow, and "28 records" with a red edit icon.

Name	OwnerType
<input checked="" type="radio"/> 1 student per Phone, Address	District
<input type="radio"/> 2010 YOG	User
<input type="radio"/> Active SPED Students	District
<input type="radio"/> Begins with a	User
<input type="radio"/> Counselor = Mr. Jones	School
<input type="radio"/> Counselor = Mr. Owens	School
<input type="radio"/> Counselor = Ms. Adler	School
<input type="radio"/> Counselor = Ms. Parker	School
<input type="radio"/> Counselor = Ms. Reyes	School
<input type="radio"/> Female 10th Grade	User

At the bottom of the dialog are "OK" and "Cancel" buttons.

4. Type a **Name** for the new filter.
5. Click the **Owner** drop-down to select who will be given access to the filter.
6. Click the **Filter Type** drop-down to select **Saved Query** or **Snapshot**.
7. Select the query or snapshot you want to add to your **Filter** menu.
8. Click **OK**. Your query or snapshot is added to the bottom of the list of your filters:



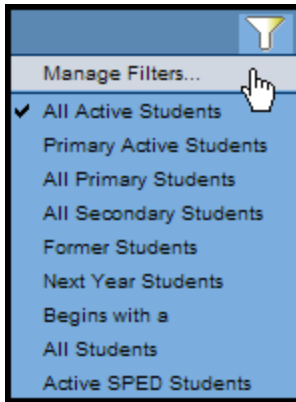
9. Click **Close**.

Note: Do not select **All Records** from your **Filter** menu if your next step will be to run a query. Instead, select **All Records** in the **Search based on** list on the Query window. Not only does this save a page refresh, it also prevents a potentially large list of records from being loaded unnecessarily.

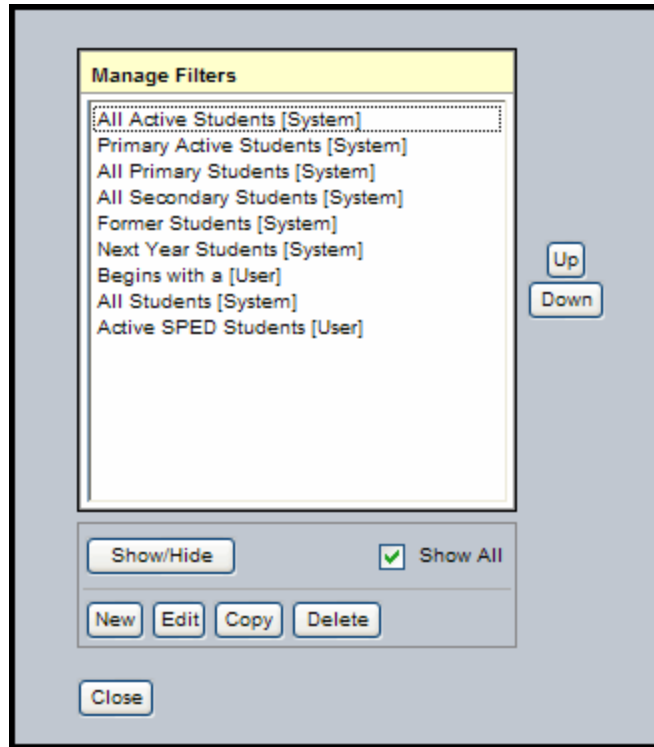
Change the Order of Existing Filters

You can change the order of the filters on your filter list. The top item on the list is your default filter for the page.

To streamline your list, you can hide filters that you do not use frequently. This keeps your access to them, but removes them from your favorites list. You can also remove filters from the Manage Filters dialog box.




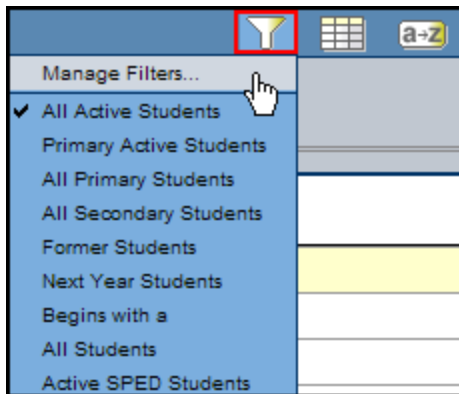
favorites list



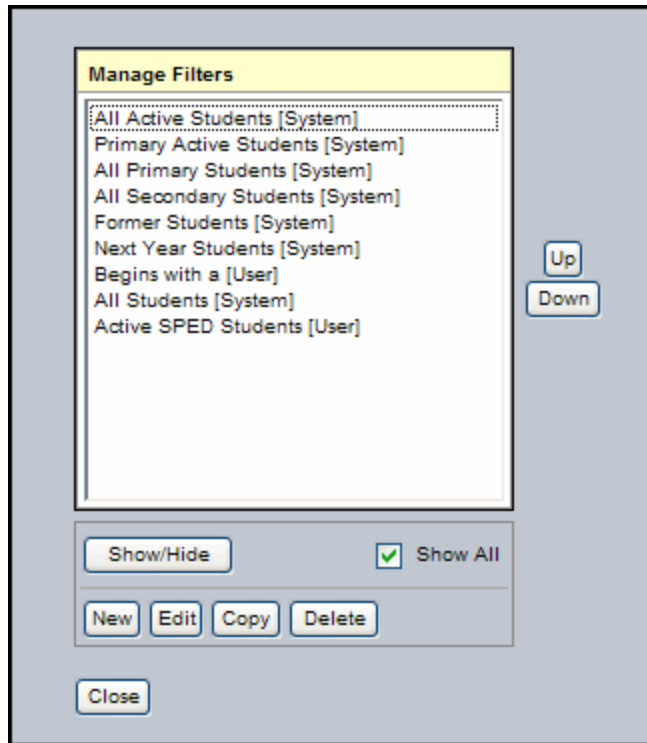
Manage Filters dialog box

To change the position of any filter on the list:

1. Click the **Filter** icon , and then select **Manage Filters**:



The Manage Filters dialog box appears:



2. Select a filter to highlight it. Click the **Up** or **Down** button until the filter is in the desired position. The top filter on the list is your default filter for the page.
3. Use the following table to learn how to hide and display filters:

Favorites list	
To hide a filter	<ol style="list-style-type: none"> 1. From the Manage Filters dialog box, click the filter to highlight it. 2. Click Show/Hide. The filter displays in parentheses and is grayed out. 3. Close the dialog box. <div style="background-color: #4f81bd; color: white; padding: 5px; margin-top: 10px;"> <p>Note: When you click the Filter icon, that filter does not appear.</p> </div>
To display a hidden filter	<ol style="list-style-type: none"> 1. From the Manage Filters dialog box, click the hidden filter to highlight it. 2. Click Show/Hide. The parentheses are removed, and the filter is no longer grayed out. 3. Close the dialog box. 4. Click the Filter icon to view the filter in your favorites list.
Manage Filters dialog box	
To hide a filter	<ol style="list-style-type: none"> 1. From the Manage Filters dialog box, click the filter to highlight it. 2. Click Show/Hide. The filter displays in parentheses and is grayed out. 3. Deselect the Show All checkbox to hide the filter completely.
To display a hidden filter	<ol style="list-style-type: none"> 1. From the Manage Filters dialog box, select the Show All checkbox. The hidden filter displays in parentheses and is grayed out. 2. To display it completely, highlight it and click Show/Hide.

4. Click **Close**.

Edit a Filter You Own

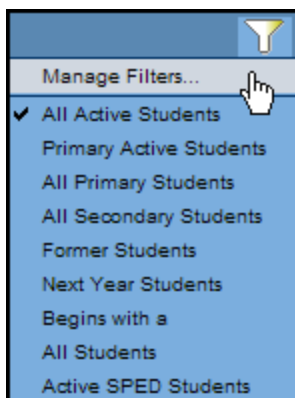
You can edit a filter that you own, but you can not edit a filter that is owned by another user. The edits you make to a filter apply to all users who have access to it.

To edit another user's filter that you have access to, first [copy](#) it, then edit it.

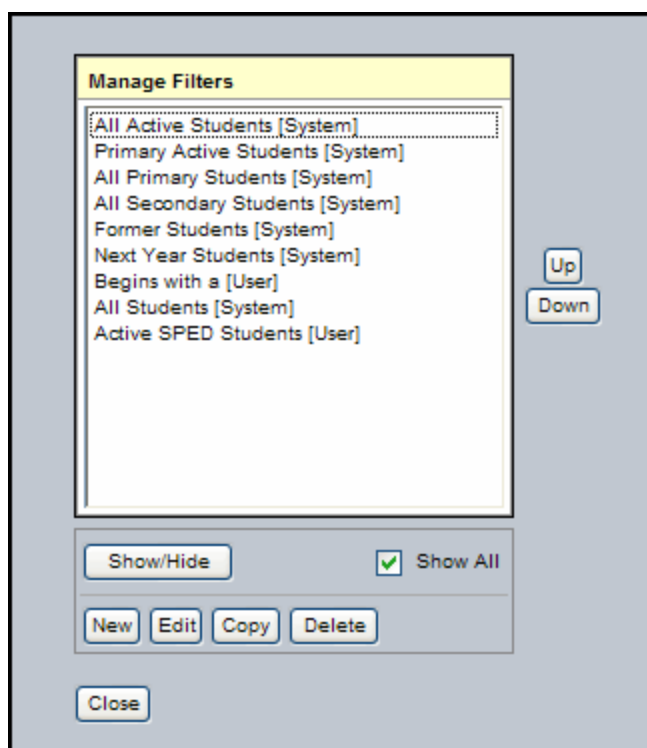
Note: You might not have security privileges to edit a school- or district-owned filter. See your Aspen system administrator for more information.

To edit a filter you own:

1. Go to a list page, such as the Student List.
2. In the upper-right corner of the page, click the **Filter** icon , and then select **Manage Filters:**



The Manage Filters dialog box appears:



3. Select the filter to highlight it, and click **Edit**. The Filter Pick List appears:

Basic Navigation

Name	OwnerType
<input checked="" type="radio"/> 1 student per Phone, Address	District
<input type="radio"/> 2010 YOG	User
<input type="radio"/> Active SPED Students	District
<input type="radio"/> Begins with a	User
<input type="radio"/> Counselor = Mr. Jones	School
<input type="radio"/> Counselor = Mr. Owens	School
<input type="radio"/> Counselor = Ms. Adler	School
<input type="radio"/> Counselor = Ms. Parker	School
<input type="radio"/> Counselor = Ms. Reyes	School
<input type="radio"/> Female 10th Grade	User

4. Make changes to the **Name**, **Owner**, and **Filter Type** fields as needed.
5. Click **OK**.
6. If needed, change the order of a filter by selecting it and then clicking **Up** or **Down**:

Manage Filters

- All Active Students [System]
- Primary Active Students [System]
- All Primary Students [System]
- All Secondary Students [System]
- Former Students [System]
- Next Year Students [System]
- Begins with a [User]
- All Students [System]
- Active SPED Students [User]
- Counselor Mr Reynolds [User]**

Up
Down

Show/Hide Show All

New Edit Copy Delete

Close

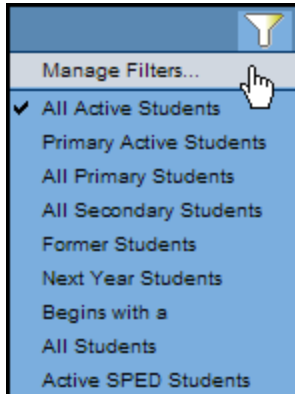
7. Click **Close**.

Copy a Filter

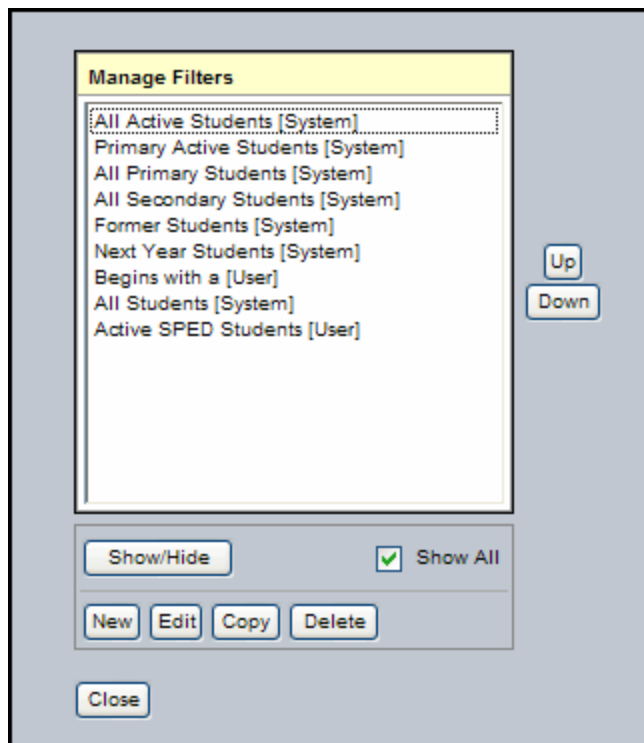
You can copy any filter, whether you own it or not.

To copy a filter:

1. Go to a list page, such as the Student List.
2. In the upper-right corner of the page, click the **Filter** icon , and then select **Manage Filters**:



The Manage Filters dialog box appears:

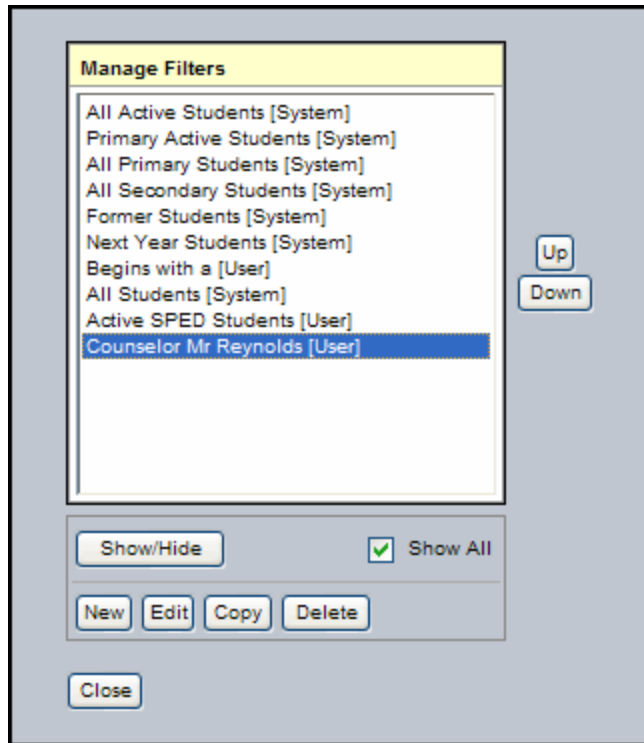


3. Select the filter to highlight it, and click **Copy**. The Filter Pick List appears:

The screenshot displays a user interface for managing filters. At the top, there are three input fields: 'Name' with the text '1 student per Phone, Address', 'Owner' with a dropdown menu showing 'Administrator, Joe', and 'Filter Type' with a dropdown menu showing 'Saved Query'. Below these fields is a navigation bar containing a left arrow, a dropdown menu with '1: 1 student per Phone, Address', a right arrow, and the text '28 records' with a red pencil icon. The main area is a table with two columns: 'Name' and 'OwnerType'. The table contains ten rows of filter entries. The first row is selected, indicated by a green circle next to the radio button. At the bottom of the interface are 'OK' and 'Cancel' buttons.

Name	OwnerType
<input checked="" type="radio"/> 1 student per Phone, Address	District
<input type="radio"/> 2010 YOG	User
<input type="radio"/> Active SPED Students	District
<input type="radio"/> Begins with a	User
<input type="radio"/> Counselor = Mr. Jones	School
<input type="radio"/> Counselor = Mr. Owens	School
<input type="radio"/> Counselor = Ms. Adler	School
<input type="radio"/> Counselor = Ms. Parker	School
<input type="radio"/> Counselor = Ms. Reyes	School
<input type="radio"/> Female 10th Grade	User

4. Make changes to the **Name**, **Owner**, and **Filter Type** fields as needed.
5. Click **Save**.
6. If needed, change the order of a filter by selecting it and then clicking **Up** or **Down**:




7. Click **Close**.

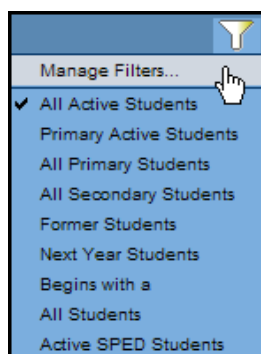
Delete a Filter

You can delete filters that you have added to your **Filter** menu. Deleting a filter deletes it from all users who have access to it.

Note: You might not have security privileges to delete a school- or district-owned filter. See your Aspen system administrator for more information.

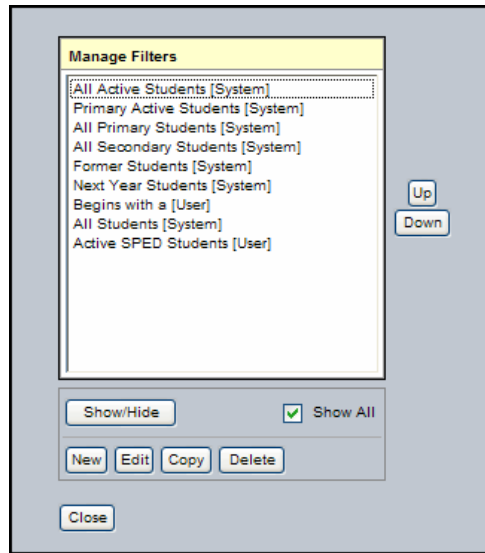
To delete a filter:

1. Click the **Filter** icon , and then select **Manage Filters**:



The Manage Filters dialog box appears:

Basic Navigation



2. Click to highlight the name of the filter you want to delete.
3. Click **Delete**.
4. Click **Close**.

Using the Field Set Menu

Throughout Aspen, you can use field sets to customize the columns that appear in a list. When you create field sets, you define the columns of information you want to see for every record on the page.

Manage your field sets in the upper right corner of each page using the **Field Set** icon :

Details	1: Abner, Andrew	0 of 723 selected							
Contacts	<input type="checkbox"/> Last name	First name	Middle name	ID	LASID	SAS			
Attendance	<input type="checkbox"/> Abner	Andrew		298-02-5017	254404	1288			
Conduct	<input type="checkbox"/> Abner	Rose		482-92-3136	255027	1836360067		2012	09
	<input type="checkbox"/> Abraham	Allison	Monica Bucuo	472-04-4731	233588	1780607786		2011	10

From this area of the page, you can do the following:


- Create a field set.
- Modify an existing field set.
- Copy a field set.
- Delete a field set.

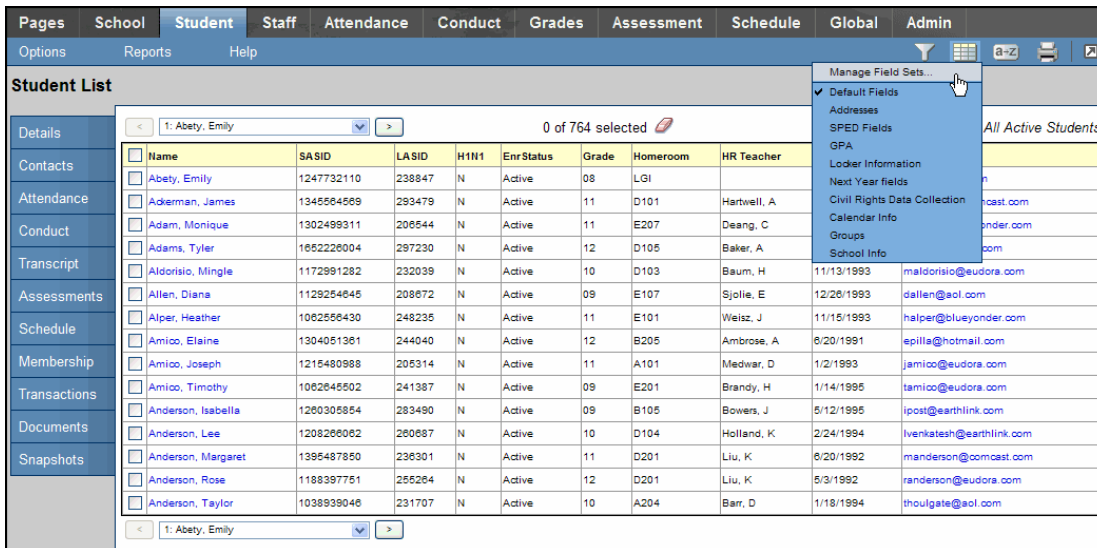
Note: You might not have security privileges to delete or edit a school- or district-owned sort order. See your Aspen system administrator for more information.

Use Field Sets

Throughout Aspen, you can use field sets to customize the columns that appear in a list. When you create field sets, you define the columns of information you want to see for every record on the page.

Note: Display the 'Alerts' column in your field sets for even quicker access to student alert content.

Manage your field sets in the right-hand corner of each page using the **Field Set** menu icon :



The screenshot shows the Aspen Student List interface. At the top, there are navigation tabs: Pages, School, Student, Staff, Attendance, Conduct, Grades, Assessment, Schedule, Global, and Admin. Below these are sub-tabs: Options, Reports, and Help. A search bar contains '1: Abety, Emily' and '0 of 764 selected'. The main table lists student records with columns: Name, SASID, LASID, H1N1, EnrStatus, Grade, Homeroom, and HR Teacher. A dropdown menu is open in the top right corner, titled 'Manage Field Sets...'. The menu items are: Default Fields (checked), Addresses, SPED Fields, GPA, Locker Information, Next Year fields, Civil Rights Data Collection, Calendar Info, Groups, and School Info. The table data includes students like Abety, Emily; Ackerman, James; Adam, Monique; Adams, Tyler; Aldoriso, Mingle; Allen, Diana; Alper, Heather; Amico, Elaine; Amico, Joseph; Amico, Timothy; Anderson, Isabella; Anderson, Lee; Anderson, Margaret; Anderson, Rose; and Anderson, Taylor.

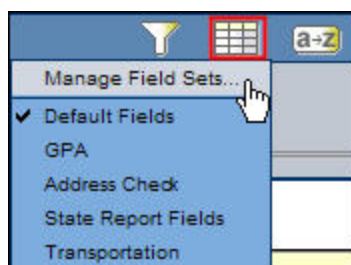
From this area of the page, you can do the following:

- Create a field set.
- Modify an existing field set.
- Copy a field set.
- Delete a field set.

Create or Edit a Field Set

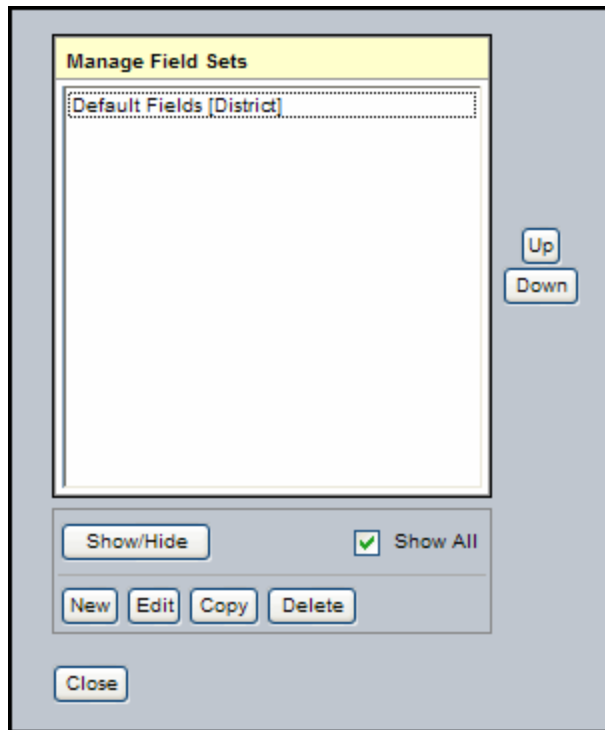
To create or edit a field set for a page:

1. Click the **Field Set** icon , and then select **Manage Field Sets:**



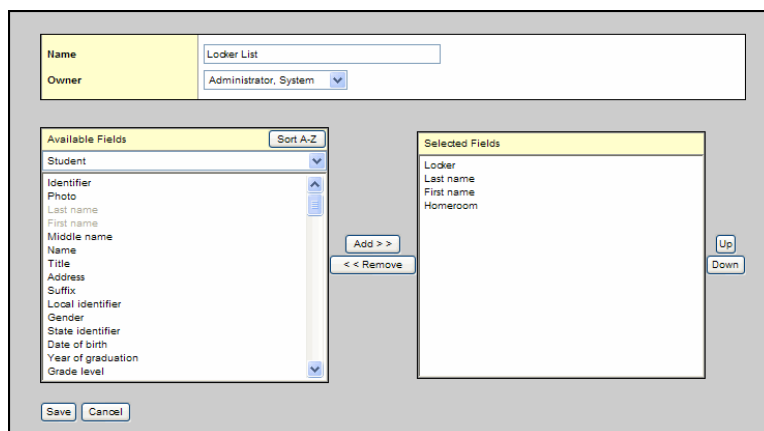
Basic Navigation

The Manage Field Sets dialog box appears:




2. Do one of the following:
3. To create a field set, click **New**.
4. To modify a field set, select the field set to highlight it, and click **Edit**.

The Define Field Set dialog box appears:



3. Type or edit the name for the field set.
4. Click the **Owner** drop-down to select who will be given access to the filter:
 - **User:** to copy this field set for yourself or another user.
 - **School:** to copy this field set for all users at your school.
 - **District:** to copy this field set for all users in your district.

5. Select the fields in the **Available Fields** list that you want to include in your field set, and click **Add**.

Note: In the **Available Fields** list, fields within each reference table are listed from most commonly used to least commonly used. To change this order to alphabetical, click the **Alpha Sort** button 

6. To remove a field from the **Selected Fields** list, highlight it and click **Remove**.
7. When the **Selected Fields** list contains all of the columns you want on your page in the order you want them to appear, click **Save**. The Manage Field Sets dialog box displays the field set you created or edited.
8. Click **Close**.

To test your new field set, select it from the Field Set list. The page displays the columns you selected in the order you specified.


Note: If you display the *Alerts* column in your field sets, it makes for even quicker access to student alert content.

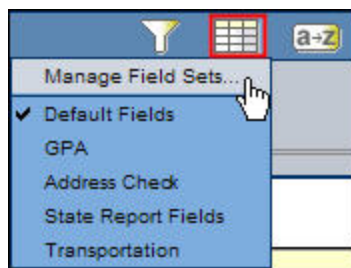
Copy a Field Set

After you create a field set, you can copy it:

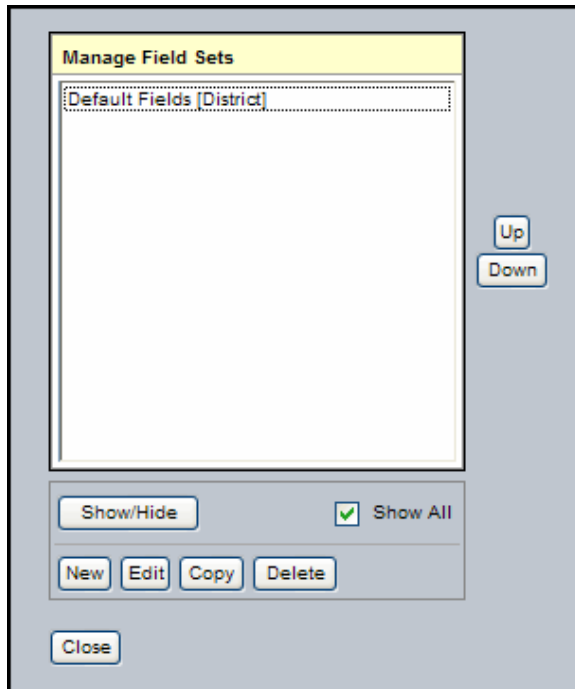
- Make a copy for yourself to use as a starting point for a new field set.
- Assign a copy to another owner – either a user, school, or the entire district (if you have appropriate security privileges).

To copy a field set:

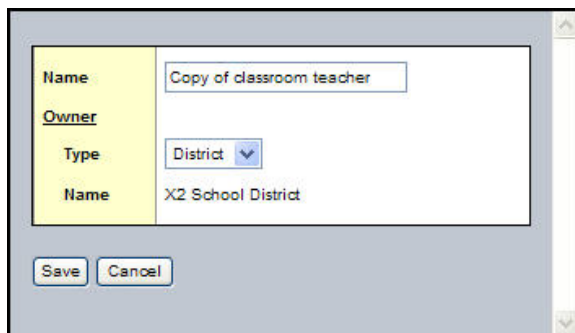
1. Click the **Field Set** icon , and then select **Manage Field Sets**:




The Manage Field Sets dialog box appears:



2. Select the field set you want to copy, and click **Copy**. The Save As dialog box appears:




3. In the **Name** field, you can change the name of the field set.
4. Click the **Owner Type** drop-down to select one of the following:
 - **User:** to copy this field set for yourself or another user.
 - **School:** to copy this field set for all users at a school.
 - **Intermediate Organization:** to copy this field set for all users in your intermediate organization.
 - **District:** to copy this field set for all users in your district.
5. At the **Owner Name** field, click  to select a different user, school, or intermediate organization.
6. Click **Save**. The field set appears on the Manage Field Sets dialog box for the user you selected at the **User** field.

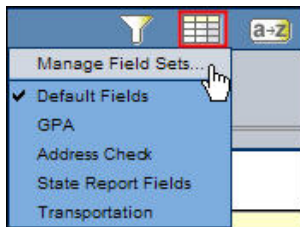
Delete a Field Set

You can delete sort orders that you've added to your **Field Set** menu. Deleting a field set deletes it from all users who have access to it.

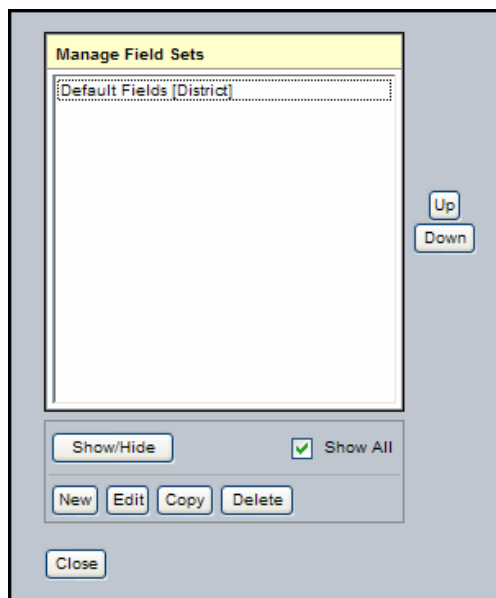
Note: You might not have security privileges to delete a school- or district-owned filter. See your Aspen system administrator for more information.

To delete a field set:

1. Click the **Field Set** icon , and then select **Manage Field Sets**:



The Manage Field Sets dialog box appears:



2. Click to highlight the name of the field set you want to delete.
3. Click **Delete**.
4. Click **Close**.

Sorting Data in Columns

On any list page in Aspen, you might be looking at hundreds or even thousands of records. The data in each record is separated into columns, such as **Name** and **Homeroom**. For each column,

it is possible to sort the data in either ascending (A-Z, 1-10) or descending (Z-A, 10-1).

There are two ways to sort the records that appear in columns in Aspen:

- Use the Sort Order menu to create a custom sort order that you can save, name, and reuse at any time.
- Use the Quick Sort option to create a temporary custom sort. The system will remember your sort order for any list pages you visit during your current Aspen session only.

Use the Quick Sort Option

You can quickly sort the information in any column within Aspen – on list pages and in pick lists. Click a column header to sort the records in ascending order. If you click the column header again, the records sort in descending order. The system remembers up to three different sorts per list and saves them as a custom sort during your current Aspen session. Note that the last column header you click serves as the primary sort for your list.

Note: If you want to create and save a custom sort, use the **Sort Order** menu.

To return to the default sort for the page, click the column header for the first column on the page.

To use the Quick Sort option:

1. Go to the list page or pick list that you want to sort:

CrsNo	Description	Sections	PPC	TPY	AltGrp	BindNext > CrsNo
010	English 9 H	4	6.0	1/1		022
011	English 9 C	3	6.0	1/1		
013	English 9	5	6.0	1/1		
015	English 9 Mod	0	0.0	0/0		
016	MCAS English	0	0.0	0/0		


2. Click within the borders of the column header that you want to sort. Those records are sorted in ascending order, and a triangle appears next to the header name ▲. For example, click **Department** to have records sort from *Admin* to *Tech Ed*.
3. To change that sort to descending order, click the column header again. The records sort from *Tech Ed* to *Admin*, and the triangle in the column header is now inverted ▼.
4. If you want to add a second and/or third level of sorting, click another column header(s).

Note: The system stacks up to three levels of sorts, with the last column header clicked serving as the primary sort. For example, if you click **Name**, then **YOG**, then **Date of Birth, DOB** is the primary sort (youngest to oldest). Within that sort, records are sorted by **YOG** (lowest year to highest year). Finally, within each of those sorts the records are sorted alphabetically by name (**A-Z**).

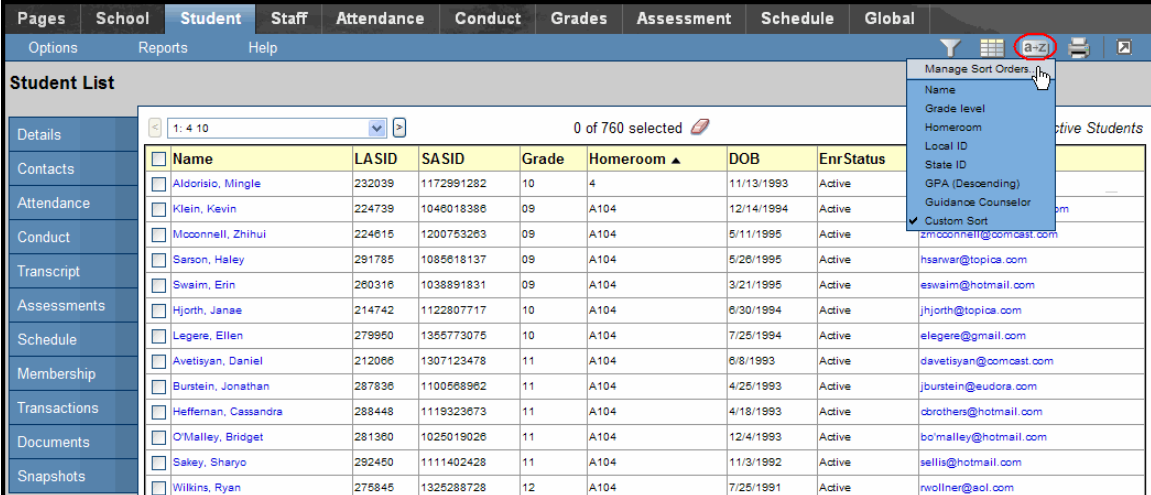
Note: Aspen remembers your selection(s) as a *Custom Sort* option on the **Sort Order** menu until you log off: Or, simply click other column headers to create a new custom sort. You cannot save a custom sort.

Note: If you created a Quick Sort and then select the **Modify List** option, Quick Sort is automatically disabled so that you do not accidentally lose your changes.

Using the Sort Order Menu

Use the **Sort Order** menu to determine the order that records appear in on any list page. Manage your sort orders in the upper-right corner of each page using the **Sort Order** icon .

In the following screenshot, the records are sorted by homeroom:



Name	LASID	SASID	Grade	Homeroom	DOB	Enr Status
Aldoriso, Mingle	232039	1172891282	10	4	11/13/1993	Active
Klein, Kevin	224739	1046018386	09	A104	12/14/1994	Active
Moonnell, Zhihui	224615	1200753263	09	A104	5/11/1995	Active
Sarson, Haley	291785	1085618137	09	A104	5/26/1995	Active
Swaim, Erin	260318	1038891831	09	A104	3/21/1995	Active
Hjorth, Janee	214742	1122807717	10	A104	6/30/1994	Active
Legere, Ellen	279950	1355773075	10	A104	7/25/1994	Active
Avetisyan, Daniel	212066	1307123478	11	A104	6/8/1993	Active
Burstein, Jonathan	287836	1100568952	11	A104	4/25/1993	Active
Heffernan, Cassandra	288448	1119323673	11	A104	4/18/1993	Active
O'Malley, Bridget	281360	1025019026	11	A104	12/4/1993	Active
Sakey, Sharyo	292450	1111402428	11	A104	11/3/1992	Active
Wilkins, Ryan	275845	1325288728	12	A104	7/25/1991	Active

The **Sort Order** menu contains a number of default options that are relevant to the page you're looking at. In addition, you can create and save new sort orders.

Note: You might not have security privileges to delete or edit a school- or district-owned sort order. See your Aspen system administrator for more information.

Note: Use the **Sort Order** menu to change the order of rows on a list page. To change the order or content of columns, edit the appropriate field set.

Use the **Sort Order** menu to:

- Create or edit a sort order.
- Copy a sort order.
- Delete a sort order.

Create or Edit a Sort Order

Use the **Sort Order** menu to determine the order that records appear in on any list page. For example, maybe you would like to see students ordered by street name. It is also possible to sort on multiple criteria and to use a reverse sort order.


You can only edit a sort order you own. The edits you make apply to all users who have access to the sort order.

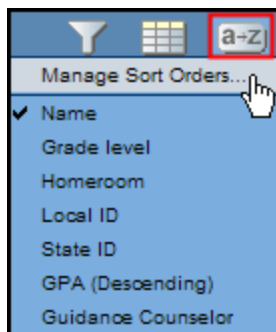
Note: Sort orders change the order of rows on a list page. You must be the owner of the sort order to edit it. To change the order of columns, edit the appropriate field set.

Note: You might not have security privileges to delete or edit a school- or district-owned sort order. See your Aspen system administrator for more information.

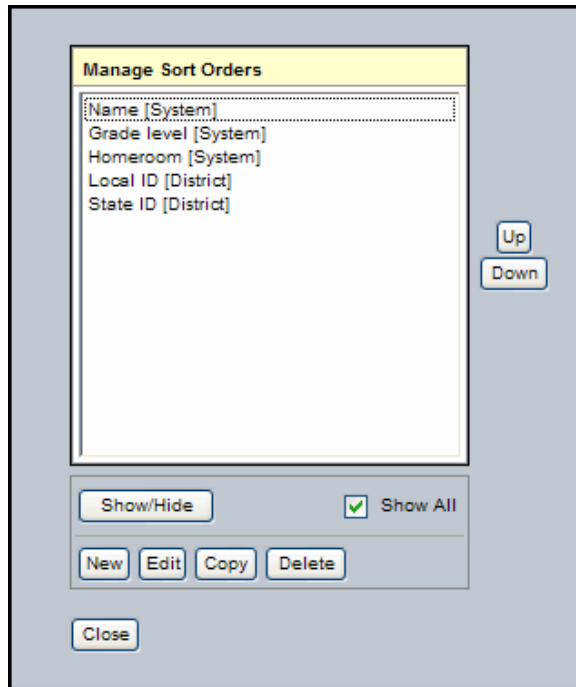
Note: If you want to create a custom sort of records for your current session only, use the Quick Sort option.

To create or edit a sort order for a page:

1. Click the **Sort Order** icon , and then select **Manage Sort Orders**:



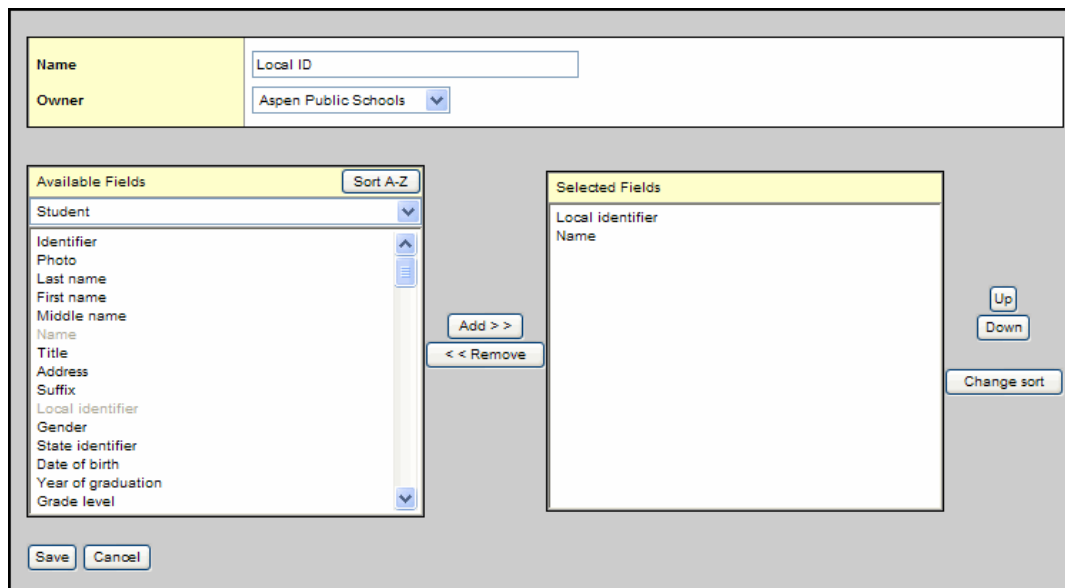
The Manage Sort Orders dialog box appears:



2. Do one of the following:

- To create a sort order, click **New**.
- To modify a sort order, select the sort order to highlight it, and click **Edit**.

The Define Sort Order dialog box appears:



3. At the **Name** field, type or edit the name for the sort order.
4. Click the **Owner** drop-down to select who will have access to the sort order:

Basic Navigation

- If you do not have access to set school or district ownership levels, this box does not appear.
 - If you have appropriate access, you can select your district as the Owner. If you do this, all users in the district will see this sort order in their list.
 - If you have appropriate access and are in the Intermediate Organization view, you can select your intermediate organization as the Owner. If you do this, all users in the organization will see this sort order in their list.
 - If you have appropriate access and are in the School view, you can select your school as the Owner. If you do this, all users in the school will see this sort order in their list.
 - If you are creating this sort order for yourself only, select your name.
5. Select the fields in the **Available Fields** list that you want to include in your sort order.

Note: Fields within each reference table are listed from most commonly used to least commonly used. To change this sort order to alphabetical, click the **Alpha Sort** button



6. Click **Add**.
7. Do any or all of the following:
- **To remove a field:** Select it to highlight its name in the **Selected Fields** list, then click **Remove**.
 - **To change the order of the sort:** Select it to highlight its name in the **Selected Fields** list, and then click **Up** or **Down**.

Note: In the **Selected Fields** list, the order of fields top-to-bottom is the order the system will sort by. For example, if **School Name** is at the top of your list, all of the records for students at the Allen School will be listed first. The second field on your list, **Year of Graduation**, is your secondary sort within the primary sort. This means that within each school, records will be grouped by students' year of graduation.

- **To reverse a sort order:** Highlight a field in the **Selected Fields** list, and click **Change sort**.

For example, if your selected field is **Physical Address > Street name** and you click **Change sort**, the records on your list page will appear alphabetically from Z to A instead of A to Z.

Note: The letters **(desc)** appear next to the field name in the **Selected Fields** box. To cancel a "change sort," highlight the field name and click **Change sort** again. **(desc)** disappears.


8. When the **Selected Fields** list contains all of the fields you want to sort by in the appropriate order, click **Save**. The Manage Sort Orders dialog box displays the sort order you created or edited.
9. Click **Close**.
10. To test your new sort order, select it from the **Sort Order** menu . The page displays the records in the order you specified.

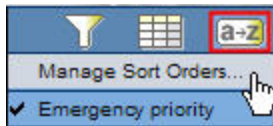
Copy a Sort Order

After you create a sort order, you can copy it:

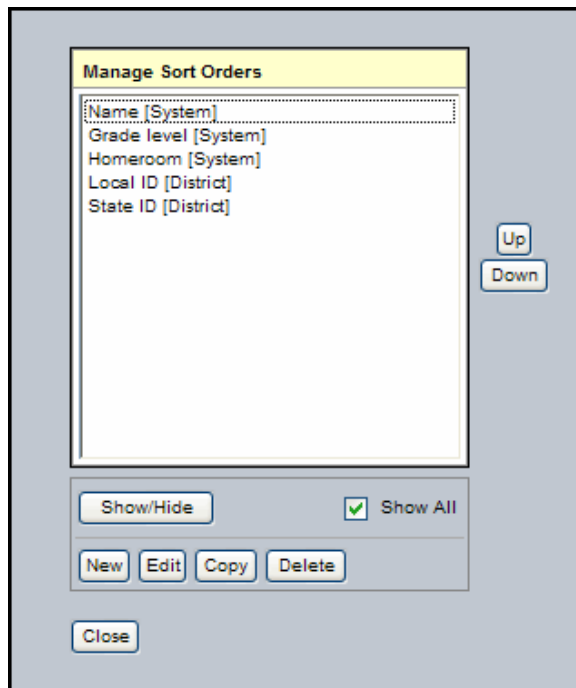
- Make a copy for yourself to use as a starting point for a new sort order.
- Assign a copy to another owner – either a user, school, or the entire district (if you have appropriate security privileges).

To copy a sort order:

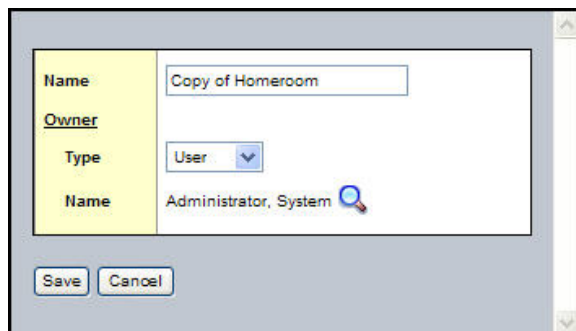
1. Click the **Sort Order** icon , and then select **Manage Sort Orders**:




The Manage Sort Orders dialog box appears:



2. Select the sort order you want to copy, and click **Copy**. The Save As dialog box appears:



Basic Navigation


3. In the **Name** field, you can change the name of the sort order.
4. Click the **Owner Type** drop-down to select one of the following:
 - **User:** to copy this sort order for yourself or another user.
 - **School:** to copy this sort order for all users at a school.
 - **Intermediate Organization:** to copy this field set for all users in your intermediate organization.
 - **District:** to copy this field set for all users in your district.
5. At the **Owner Name** field, click  to select a different user, school, or intermediate organization.
6. Click **Save**. The sort order appears on the Manage Sort Orders dialog box for the user you selected at the **Type** field.
7. Click **Close**.

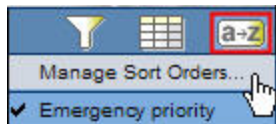
Delete a Sort Order

You can delete sort orders that you have added to your **Sort Order** menu. Deleting a sort order deletes it from all users who have access to it.

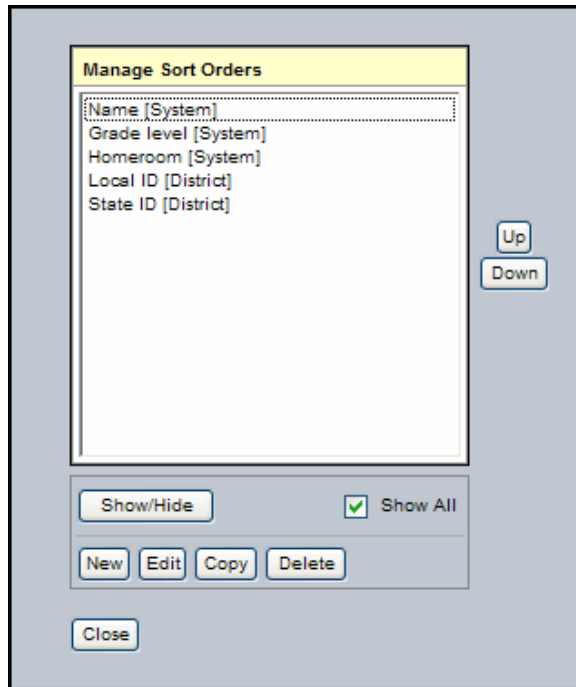
Note: You might not have security privileges to delete or edit a school- or district-owned sort order. See your Aspen administrator for more information.

To delete a sort order:

1. Click the **Sort Order** icon , and then select **Manage Sort Orders**:



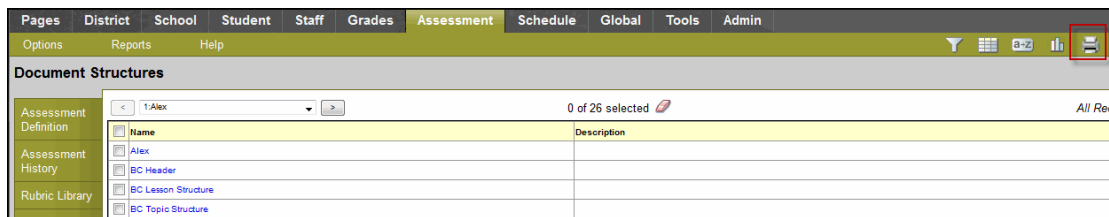
The Manage Sort Orders dialog box appears:



2. Click to highlight the name of the sort order you want to delete.
3. Click **Delete**.
4. Click **Close**.

Use the Quick Print Menu

Use the Quick Print menu on list pages to quickly create reports to capture information about the list of records you are viewing in a printable format:



Using the Quick Print menu, you can create two types of reports:

- A Quick Print, which is a *Simple* Quick Report that instantly prints the list of records you are viewing in a formatted report.

To generate a *Simple* Quick Report (known as a [Quick Print](#)), click the **Printer** icon. Select an output format, such as **Web Page (HTML)**, and your Quick Print appears:

Student List - All Active Students									
Name	SASID	LASID	H1N1	EnrStatus	Grade	Homeroom	HR Teacher	DOB	Email 1
Ackerman, James	1345564569	293479	N	Active	11	C107	Wilson, A	8/19/1992	jackerman@comcast.com
Adam, Monique	1302499311	206544	N	Active	11	E207	Deang, C	1/20/1993	madam@blueyonder.com
Adams, Tyler	1652226004	297230	N	Active	12	D105	Baker, A	7/10/1991	tadams@gmail.com
Aldoriso, Mingle	1172991282	232039	N	Active	10	D103	Baum, H	11/13/1993	maidoriso@eudora.com
Allen, Diana	1129254645	208672	N	Active	09	E107	Sjolie, E	12/26/1993	dallen@aol.com
Alper, Heather	1062556430	248235	N	Active	11	E101	Weisz, J	11/15/1993	halper@blueyonder.com
Amico, Elaine	1304051361	244040	N	Active	12	B205	Ambrose, A	6/20/1991	epilla@hotmail.com
Amico, Joseph	1215480988	205314	N	Active	11	A101	Medwar, D	1/2/1993	jamico@eudora.com
Amico, Timothy	1062645502	241387	N	Active	09	E201	Brandy, H	1/14/1995	tamico@eudora.com
Anderson, Isabella	1260305854	283490	N	Active	09	B105	Bowers, J	5/12/1995	ipost@earthlink.com
Anderson, Lee	1208266062	260687	N	Active	10	D104	Holland, K	2/24/1994	venkatesh@earthlink.com
Anderson, Margaret	1395487850	236301	N	Active	11	D201	Liu, K	6/20/1992	manderson@comcast.com
Anderson, Rose	1188397751	255264	N	Active	12	D201	Liu, K	5/3/1992	randerson@eudora.com
Anderson, Taylor	1038939046	231707	N	Active	10	A204	Barr, D	1/18/1994	thoulgate@aol.com
Anderson, Zachary	1360247593	213726	N	Active	10	E102	Wilson, A	11/28/1993	zimsong@webfoot.com
Antuna, Erika	1330258775	272189	N	Active	11	M101	Gordon, J	11/24/1992	ejicoeur@earthlink.com
Arakelian, Andrew	1090613445	254713	N	Active	10	B205	Ambrose, A	11/17/1993	agannaway@webfoot.com
Arakelian, James	1048595505	210338	N	Active	09	E207	Deang, C	5/20/1995	jarakelian@msn.com

- A Quick Report, which is an on-the-fly report of the information you are viewing on a list page. You decide what's on it, and the system formats it to look professional.

There are four types of Quick Reports:

- **Simple:** Produces a list of the records and fields you select to include
- **Detail:** Produces a page for each record, and the report aligns the data fields vertically instead of horizontally
- **Group:** Groups records by the fields you select, such as homeroom
- **Summary:** Hides individual records from the list and produces a list of cumulative values based on the records


To create a Quick Report, click the **Printer** icon, and click **Create Quick Report**. The Quick Report wizard appears and walks you through the steps of creating the report you need.

Use the Dictionary Menu

Use the **Dictionary** menu to access a list of available extended Data Dictionaries. Then select the one you want. Doing so enables you to work with the columns defined in that dictionary.

For example, if the High School Transcript Definition contains the columns Term 1 Grade and Term 2 Grade, you will be able to use these columns in field sets, queries, and sort orders after selecting **High School Transcript Definition** from the **Dictionary** menu.

Note: This menu only appears in Aspen on lists that use extended Data Dictionaries, like transcripts and IEPs.


Manage your extended Data Dictionaries in the upper-right corner of the page by clicking the **Dictionary** icon :

Year	Grade	Course Desc	FinalAvg
2009	10	Homeroom	
2009	10	English II	
2009	10	Modern World History	0.0
2009	10	Algebra II	0.0
2009	10	Chemistry	0.0
2009	10	AP Physics B	0.0
2009	10	Spanish IV Advanced	0.0
2009	10	Advanced Music Theory	0.0
2009	10	Fitness Concepts II	0.0

Use the Maximize Icon

The **Maximize** icon  lets you view more of the page body in Aspen:

Demographics	First name * <input type="text" value="June"/>	School > Name <input type="text" value="South Elementary School"/>
	Middle name <input type="text" value="Santana"/>	Local identifier <input type="text" value="11639"/>
	Last name * <input type="text" value="Abety"/>	State identifier <input type="text" value="87228728"/>
	Suffix <input type="text"/>	Status <input type="text" value="Active"/>
Gender	<input type="text" value="F"/>	Department <input type="text" value="Occupational Therapy"/>
Date of birth <input type="text" value="4/7/1984"/> Age 46	Home Phone <input type="text" value="781-749-9544"/>	Type <input type="text"/>
Work Phone <input type="text" value="617-681-2612"/>	Cell Phone <input type="text" value="508-796-2546"/>	Special Ed <input checked="" type="checkbox"/>
Primary email <input type="text" value="jabety@hotmail.com"/>	Hire date <input type="text" value="2/2/2009"/>	Bargaining unit <input type="text" value="Other"/>
Homeroom <input type="text"/>	District Attendance Group <input type="text" value="BPS Employees*"/>	EPIMS Status <input type="text"/>
Homeroom 2 <input type="text"/>		

Click the **Maximize** icon , located in the menu bar, to hide the top tabs and side-tabs and view more of the main part of the page:

Basic Navigation

Options Reports Help

Staff List :: Abety, June

Save Cancel Default Template

Demographics Addresses Ethnicity


First name * June
Middle name Santana
Last name * Abety
Suffix

School > Name South Elementary School
Local identifier 11639
State identifier 87228728
Status Active

Gender F
Date of birth 4/7/1964 Age 46
Home Phone 781-749-9544
Work Phone 617-681-2612
Cell Phone 508-796-2546
Primary email jabety@hotmail.com
Homeroom
Homeroom 2

Department Occupational Therapy
Type
Special Ed
Hire date 2/2/2009
Bargaining unit Other
District Attendance Group BPS Employees*
EPIMS Status

Save Cancel

This feature is especially useful on long pages, such as the Student detail page. In **Maximize** mode, the **Maximize** icon is replaced by the **Minimize** icon. Click the **Minimize** icon  to show the full page again.

Use Quick Charts

Quick Chart is a part of Data Analytics in Aspen. Charts provide an organized way to visually represent data.

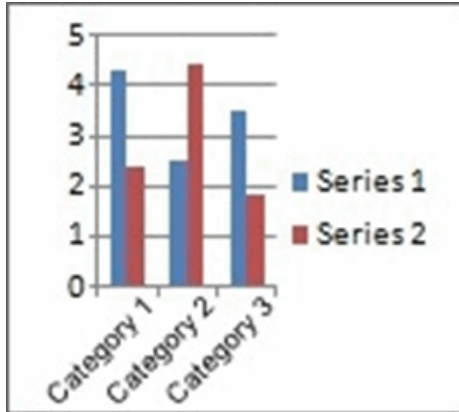
The Quick Chart feature enables you to create bar, line, and pie charts* from any standard list page. These charts can be saved for future use.

Note: Use Quick Charts as way to collect statistics quickly. For example, say you want a count of students by grade and gender. Just select **Bar Chart** and under the **Quick Chart** menu, enter **Grade** and **Gender** and click **OK**. Beneath the chart are the counts.

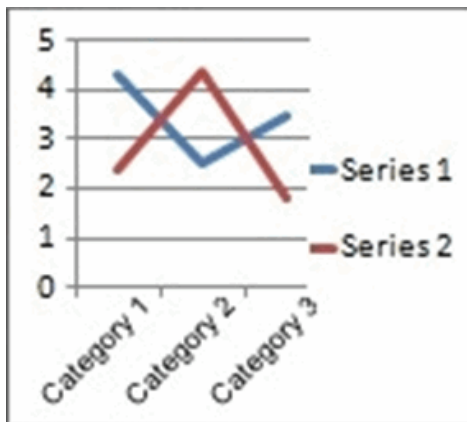
Users with privileges to manage school and/or district resources can create charts to share school- and district-wide. The charts are generated through the generic reporting structure of Aspen and are therefore fully customizable.

There are three chart types:

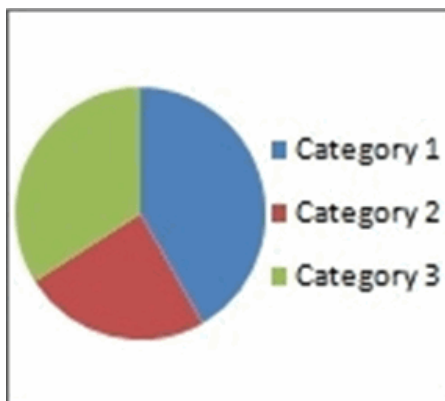
- **Bar**



- Line



- Pie



Select one of the following topics to learn more about Quick Charts:

- [Create a Quick Chart](#)
- Use Quick Print Charts
- [Quick Chart Examples](#)

Create a Quick Chart

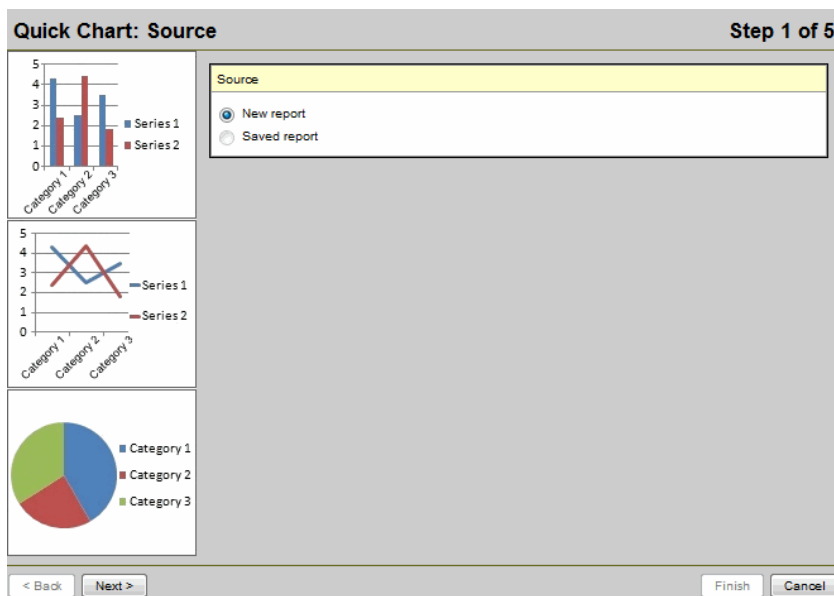
On all standard list pages, click the **Quick Chart** icon  to access the following options:

- **Create Quick Chart:** Brings up the Quick Chart Wizard, which allows you to customize many different areas of the resulting chart.
- **Bar Chart:** Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the bar chart.
- **Line Chart:** Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the line chart.
- **Pie Chart:** Brings up a streamlined Quick Chart screen, which requests only minimal information required to create the pie chart.

To create a Quick Chart:

In any standard list view, click  and select **Create Quick Chart** to open the Quick Chart wizard, or select **Quick Chart** from the **Reports** menu.

The Create Quick Chart wizard appears:



The Create Quick Chart wizard has five steps:

Step 1: Source

1. Click one of the following:
 - **New report:** Select this option if you want to create a Quick Chart from scratch.
 - **New report:** Select this option if you want to create a Quick Chart from scratch.

- If you select **Saved report**, a table of saved Quick Charts appears in the dialog box. Select the Quick Chart you want to view or edit.
- If you selected **New report**, click **Next**. If you selected **Saved report** you can click **Next** to continue editing, or **Finish** to show the chart.

Step 2: Report Type

Quick Chart: Report Type Step 2 of 5

Report Type Quick Chart - Line

This is a line chart. Pick one or two group by fields to display. The information is displayed as a series of data points connected by line segments. Each data point represents the frequency of each category (horizontal axis) for each series (legend entries).

Format Standard Line Chart

< Back Next > Finish Cancel

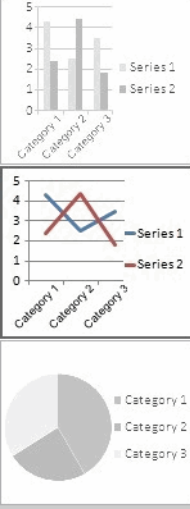
- Click the **Report Type** drop-down to select one of the following:
 - **Quick Chart—Bar**
 - **Quick Chart—Line**
 - **Quick Chart—Pie**
- Click the **Format** drop-down to select the format for the chart. A Standard version and an Enhanced (3-D) version are provided with Aspen.

Note: Each Quick Chart format is a standard report which can be seen in the District view, **Tools > Reports**. Formats can be customized with a similar process to any other report in the system. To add a new format for a specific Quick Chart type, it is recommended to copy the standard report for that type as the base and then change the format as necessary. To have a new format be available to users, set the report category as one of the new Quick Report types.

- If this is a new report, click **Next**. If you are editing a saved report, you can click **Next** to continue editing, or **Finish** to show the chart.

Step 3: Field Selection

Quick Chart: Field Selection
Step 3 of 5



Categories (Horizontal Axis)

Group by field 🔍

Interval ▼

Group trivial results as "Other" Less than %

Series (Legend Entries)

Group by field 🔍


Group trivial results as "Other"

< Back
Next >
Finish
Cancel

1. In the **Categories (Horizontal Axis)** box, click 🔍 at **Group by field** and make a selection. You can choose from the tables and fields that are related to the records in your current list. The **Categories (Horizontal Axis)** box, sometimes called the independent variable, sets the data you want to measure. If you choose a **Numeric, Date** or **Time** field, additional options appear to further organize the data which will be displayed on the chart. The following table describes each of the possible selections which require additional fields:

Selection Type (example)	Additional Fields	Description
Numeric (YOG)	Interval	<p>The Interval drop-down menu for numeric has the following options:</p> <ul style="list-style-type: none"> • Chart each value separately: Each numeric value gets its own data point. • Interval group: The Interval field groups the results according to the number entered in the Interval group size field. For example, if you want the group Year of Graduation to display in the chart in pairs, you would enter 2 in this field. • Interval group summations • Total summation: Sums the values of the Group by field.
	Interval group size	<p>The Interval group size appears if you select Interval group or Interval group summations at the Interval field. The value in this field sets the number of data points that get combined into a single category.</p>
	Group insignificant data	<p>Select this checkbox if you want to group all data points of less than a certain percent. For example, if you are only concerned with viewing the several most common conduct codes, you might want to select this option and enter a value of 5% or 10% in the Less than n % field.</p> <div data-bbox="938 1394 1409 1549" style="background-color: #4a7ebb; color: white; padding: 5px;"> <p>Note: You are only able to use this option in the Categories or Series, but not both.</p> </div>
	Less than n%	<p>Sets the percent under which data is grouped in the Other category.</p>
Date (Date of Birth)	Interval	<p>The Interval drop-down for a date type field has the following options:</p> <ul style="list-style-type: none"> • Chart each date separately

Selection Type (example)	Additional Fields	Description
		<ul style="list-style-type: none"> • By day of week • By day of week and month • By day of week and year • By week • By week and year • By month • By month and year • By school year
Time (Time)	Interval	<p>The Interval drop-down for a time type field has the following options:</p> <ul style="list-style-type: none"> • Chart each time separately • By minute • By minute, hour and date • By hour • By hour and day

2. For bar and line charts, a **Series (Legend Entries)** box is available. Click  at the **Group by field** and make a selection. Additional options are available, as described above for **Categories** selection. Series groups appear in a legend to the right of the chart and provide a color-coded guide to data shown in the chart.

Note: Bar and line charts do not require both a category and series to be selected. Charts that exclude a category will not have x-axis labels. Charts that exclude a series will not include a legend.

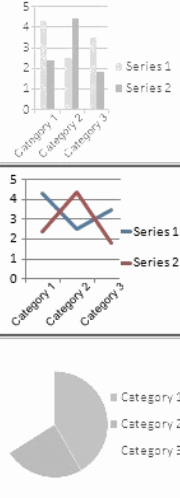
3. If the list of data being charted contains trivial cases which should be excluded from the chart, the option **Group trivial results as "Other"** is provided. Select this checkbox if you want to group all data points of less than a certain percent together into a single point called Other. For example, if you are only concerned with viewing the most common conduct codes, you might want to select this option and enter a value of **5%** in the **Less than n %** field. This will group all codes which total less than 5% of the total data into a single Other group.

Note: You are only able to use this option in the **Categories** or **Series**, not both.

4. You can click **Next** to continue the wizard and set chart options, or **Finish** to create the chart. New charts use the default format options if you click **Finish** at any point before the final step in the wizard.

Step 4: Format Options

Quick Chart: Format Options Step 4 of 5



Header

Report title

Print date

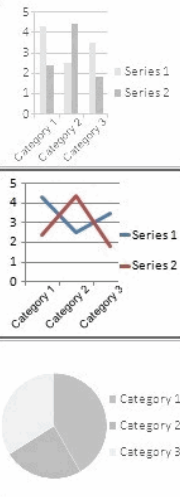
Footer **Data Set Totals** **Page Break**

Chart summary

1. In the **Report title** field, enter a title for your report. The title appears above the chart.
2. If you want the date the report was created to appear on the report, select **Print date**.
3. If you want a table of data summarizing the chart to appear below the chart, select **Data Set Totals**.
4. If you want the table data summarizing the chart to appear on its own page, select **Page Break**.
5. Click **Next** to continue editing, or **Finish** to show the chart.

Step 5: Save Options

Quick Chart: Save Options Step 5 of 5



Save Options

Don't save
 Save
 Save as


Name

Owner

Type

Name

Basic Navigation

1. In the **Save Options** section, click one of the following:
 - **Don't save:** The report appears in your job queue, but if you want to run the chart again, you must recreate it.
 - **Save:** This option is only available if the chart has already been saved. This option overwrites the previous version.
 - **Save as:** This option saves the chart with the name you type in the **Name** field.
2. If you selected **Save as** in the **Save Options** section, type what you want to name the chart in the **Name** field.
3. Under **Owner**, select **District** or **User** from the **Type** drop-down.
4. If you select the type **User** in the **Type** drop-down, click  at the **Name** field to select a user.
5. Click **Finish**.

The chart appears in a pop-up window.

Quick Chart Examples



Following are real-world examples of how you can use Quick Charts:

- [Example 1: Pie Chart](#)
- [Example 2: Line Chart](#)
- [Example 3: Bar Chart](#)
- [Example 4: Using Quick Charts with Analytics](#)

Quick Chart Example: Pie Chart

The affirmative action committee for the Aspen school district is studying the diversity of the student population. Members want to create a pie chart showing the percentage of students by race. Cindy Kelley, a guidance counselor at Bay Middle School, and an Aspen system administrator for the district volunteer to create the pie chart.

To create the pie chart:

1. Cindy logs on to the District view and clicks the **Student** tab.
2. She then clicks  and selects **Create Quick Chart** to bring up the Quick Chart Wizard.
3. In Step 1 of the Quick Chart wizard, Cindy selects **New report** and clicks **Next**.
4. In Step 2 of the wizard, Cindy selects **Quick Chart - Pie** for **Report Type** and **Standard Pie Chart** for **Format** and clicks **Next**.
5. In Step 3, Cindy selects the field to be used for the pie chart. She clicks  in the **Categories (Horizontal Axis)** section to the right of the **Group by field** to open a pick list. She can choose any of the available fields from the current list. Because she is specifying a chart where each slice of the pie represents the number of students in each of the possible values for the **Race** field, she selects Student for the **Table**, and Race for the **Group by field**. She then clicks **OK** to save her selections. She clicks **Next**.

Note: If you don't see the **Race** field listed, click the **Show All Fields** link at the top of the pick list.

Group by field [Show All Fields >>](#)

Available Fields

Student ▼

Name ▲

Address

Local identifier

State identifier

Year of graduation

Date of birth

Grade level

Homeroom

Enrollment status

Calendar

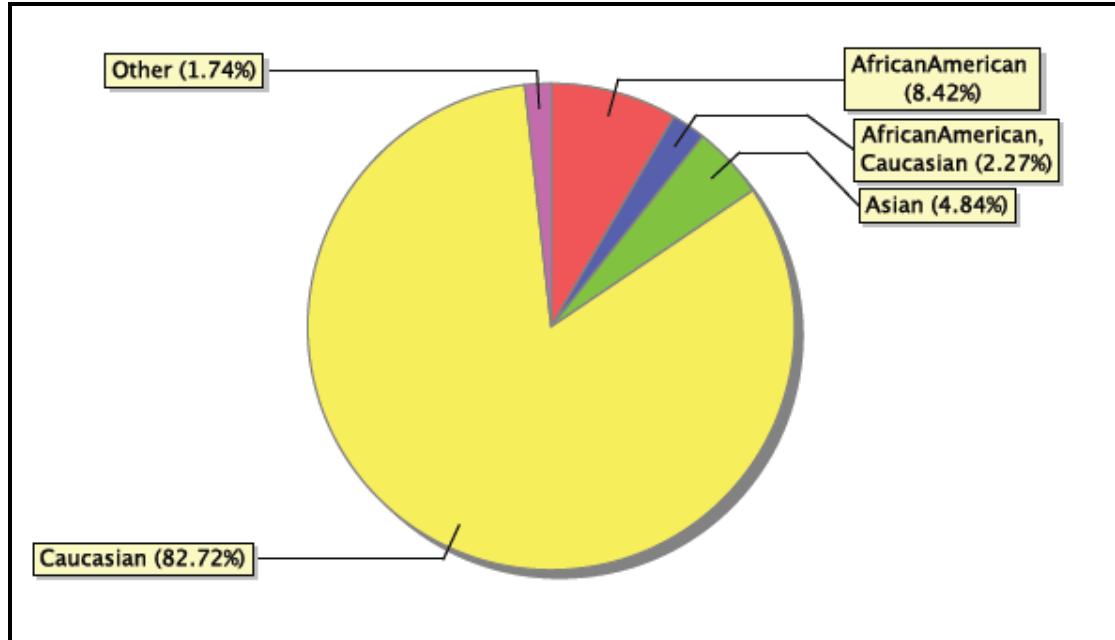
Race

Alerts

Quick Status

- In Step 4, Cindy enters Aspen School District Students By Race for the **Report title**. She uses the default settings for the remaining chart format options and clicks **Next**.
- In Step 5, Cindy selects **Save as** and enters Students By Race in the **Name** field and clicks **Finish**.




The resulting pie chart appears:



Quick Chart Example: Line Chart

Crow Point High School principal Michael Rogers wants a line chart for a visual representation of the GPA of seniors.

To create the line chart:

1. Michael logs on to the School view and clicks the **Grades** tab.
2. He queries for YOG=2012 AND Year ID = 2011-2012 (latest cumulative GPA).
3. He then clicks  and selects **Create Quick Chart** to bring up the Quick Chart wizard.
4. In Step 1 of the Quick Chart wizard, Michael selects **New report** and clicks **Next**.
5. In Step 2 of the wizard, Michael selects Quick Chart - Line for **Report Type** and **Standard Line Chart** for **Format** and clicks **Next**.
6. In Step 3, Michael specifies the data he wants displayed in his chart. He clicks  in the **Categories (Horizontal Axis)** section to the right of the **Group by field** to open a pick list dialog box, and chooses **Student Grade Point** for the **Table**, and Cumulative grade point average for the **Group by field**. He then clicks **OK** to save his selections and return to the Field Selection step of the wizard. Because **Cumulative grade point average** is a numeric field, he must specify the **Interval** for the categories on the horizontal axis. Michael selects **Interval group** for the **Interval** and specifies **0.5** for the **Interval group size**. The categories on the horizontal axis will be cumulative GPAs of 0.0-0.5, 0.5-1.0, 1.0-1.5 and so on. The first category contains cumulative GPAs from 0.0 up to but not including 0.5. Michael clicks  in the **Series (Legend Entries)** section to the right of the **Group by field** and chooses School Year Context for the table and Year ID for the field. He then clicks **OK** to save his selections. He clicks **Next**.




- In Step 4, Michael enters Cumulative GPA of HS Seniors in the **Report title** field. Michael uses the default settings for the remaining **Header** options. For the **Chart summary**, Michael accepts the default for **Data Set Totals** (selected by default) and clicks **Next**.
- In Step 5 of the Quick Chart Wizard, Michael uses the default values and clicks **Finish**.

The resulting line chart appears.

Quick Chart Example: Bar Chart

Zachary Lareau, one of the assistant principals of Crow Point High School, implemented an attendance incentive program in the 2010-2011 school year. He would like to compare the attendance of 2010-2011 with the two previous school years using a bar chart.

To create the bar chart:

- Zachary logs on to the School view and clicks the **Attendance** tab.
- He clicks the **Daily History** side-tab.
- He filters his data on all records starting from the first day of the 2008-2009 school year through the last day of the 2010-2011 school year.
- He then clicks  and selects **Create Quick Chart** to bring up the Quick Chart wizard.
- In Step 1 of the Quick Chart wizard, Zachary selects **New report** and clicks **Next**.
- In Step 2 of the wizard, Zachary selects Quick Chart – Bar for the **Report Type** and **Standard Line Chart** for **Format** and clicks **Next**.
- In Step 3, Zachary specifies the data he wants displayed in his chart. He clicks  in the **Categories (Horizontal Axis)** section to the right of the **Group by field** to open a pick list, and chooses Student Attendance for the **Table** and Date for the **Group by field**. He clicks **OK** to save his selections. Because **Date** is a date-type field, he must specify the **Interval** for the categories on the horizontal axis. Zachary selects By school year for the **Interval**. The categories on the horizontal axis will be each school year in the **Date** field of the current list. For the **Series (Legend Entries)**, Zachary clicks  in the **Series (Legend Entries)** section to the right of the **Group by field** to open a pick list. Zachary specifies Student Attendance for the **Table** and Code for the **Group by field**. The series will consist of each code value in the **Code** field. He clicks **OK** to save his selections and return to the Field Selection step of the wizard. Because **Code** is a character-type field, **Interval** is not displayed. Zachary selects the **Group insignificant data** checkbox and enters 10 in the **Less than %** field so that codes with less than 10% of the total population are grouped in an Other series. He clicks **Next**.
- In Step 4, Zachary enters High School Yearly Attendance Trends in the **Report title** field. Zachary uses the default settings for the remaining format options and clicks **Next**.
- In Step 5 of the Quick Chart wizard, Zachary uses the default values and clicks **Finish**.




The resulting bar chart appears.

Using Quick Charts with Analytics: an Example

Cindy Kelly, the guidance counselor at Bay Middle School and an Aspen system administrator, is comparing the number of student absences for this year for all schools in the district. The

Attendance by Student analytic is run each evening. She wants to create a bar graph of the absent totals by school.

To use Quick Charts with Data Analytics:

1. Cindy logs into the District view, and selects the **Global** tab, **Analytics** side-tab.
2. From the **Dictionary** menu, she selects **Attendance by Student**.
3. She then clicks  and selects **Bar Chart** to bring up the Quick Chart pop-up for bar charts.
4. She clicks  in the **Categories (Horizontal Axis)** section to the right of the **Group by field** to open a pick list, and chooses School for the **Table** and Name for the **Group by field**. She clicks **OK** to save her selections. For the **Series (Legend Entries)**, she clicks  in the **Series (Legend Entries)** section to the right of the **Group by field** to open a pick list. She specifies Attendance by Student for the **Table** and Absent Total for the **Group by field**. She clicks **OK** to save her selections. She selects Total summation for the **Interval**. This will provide the sum of the values in the **Absent Total** column for each school in the district.
5. She accepts the default for the **Format** and clicks **OK**.

The resulting bar chart appears.

Using Snapshots to Create and Store Groups

A snapshot represents a static filter. Think of a snapshot as a picture of a particular group of students, staff members, courses, or rooms that you can file and easily retrieve.

For example, assume you manage the Math club and want to be able to quickly access all of the students who are members. You can use a query to find the students initially, and then create a snapshot of these students. This way, each time you want to work with students in the Math club, you need only refer to your snapshot.

To create a snapshot:

1. Do one of the following:
2. Search for or select the records you want to include in your snapshot. You might select these records individually, or use a query to find them.

Note: Be sure to select the checkbox next to each record you want to include in your snapshot, click the **Options** menu, then click **Show Selected**.

3. On the **Options** menu, click **Snapshots**.
4. In the Manage Snapshots dialog box, click **New**. The Snapshot Definition dialog box appears:

The screenshot shows a configuration window for a snapshot. It has a yellow header area with the following fields:

- Name:** Math Club
- Owner:** Aspen Public Schools (dropdown menu)
- Save as filter:**
- Move to top of my list:**

Below this is a section titled "Records to Include" with a yellow background. It contains two radio buttons:

- Current List
- Snapshot Combination


Under "Snapshot Combination", there are three dropdown menus:

- Math Club
- Union
- Math Club

At the bottom of the window are "Save" and "Cancel" buttons.

5. Type a name for this snapshot.
6. Click the **Owner** drop-down to select the user, school, intermediate organization, or district as the owner. This determines which other users, if any, can use this snapshot.

Note: Not all users have privileges for all levels of ownership.

7. If you would like to make this snapshot an option on your **Filter** menu , select the **Save as filter** checkbox.
8. If you would like this snapshot to be your default filter (for example, whenever you open the Student List, these are the records you'd like to see), select the **Move to top of my list** checkbox.
9. In the **Records to Include** box, select one of the following:
 - Current List to include only those records you selected checkboxes for on the list page.
 - Snapshot Combination to combine two existing snapshots. (This option is only available if you have already defined at least two snapshots.)
10. If you selected **Snapshot Combination**, use the following table to determine how you want to assemble the two snapshots you select:

Select	To include the following in the snapshot:
Union	Any records that appear in the first snapshot you select or the second snapshot you select. For example, if you want to create a snapshot of students who appear on either or both the first term and second term honor roll, select Union .
Intersect	Only records that appear in both the first and second snapshot you select. For example, if you want to create a snapshot of students who appear on both the first and second term honor rolls, select Intersect .
Difference	Any record that appears in the first snapshot you select, but not in the second. For example, if you want to create a snapshot of students who appear on the first term honor roll, but not on the second term honor roll, select Difference .

11. Click **Save**. The Manage Snapshots dialog box displays the snapshot you created.
12. Select the snapshot you created, and click **Use**. The list page displays the records in the snapshot selected.

Note: You can also save a snapshot to the **Filter** menu on a list page. Then, you can quickly select that snapshot.

Manage Snapshots for Individual Records

You can manage the snapshots a specific student, staff member, room, or course is a member of. For example, assume you create a snapshot of all students on the Volleyball team at the beginning of the season. Then, a student joins the team. Select that student and add him or her to the snapshot.

To manage snapshot membership for an individual record:

- To manage student snapshots, click the **Student** tab.
 - To manage staff snapshots, click the **Staff** tab.
2. Search for and select the specific record.
 3. Click the **Snapshots** side-tab. A list of snapshots the student, staff member, course, or room belongs to appears.
 4. Do one of the following:
 - To add the record to a snapshot, on the **Options** menu, click **Add**. The Snapshot Pick List appears. Select the snapshot and click **OK**.
 - To delete a record from a snapshot, select the checkbox next to the record. On the **Options** menu, click **Delete**.

Use Breadcrumbs

Aspen leaves breadcrumbs at the top of each page to remind you of the path you took to access the page you are currently using:



The breadcrumbs contain each page you accessed to arrive at the current page. For example, the user in the screenshot above clicked the **Schedule** tab, selected the **World Mythology** course, selected **Teachers** on the **Master** side-tab, then clicked **Jenette Porter**.


Any breadcrumb in blue is a link to that page. For example, if you click [the school's master schedule](#), the school's master schedule will appear.

Use breadcrumbs to quickly return to the most recent pages and information you used.

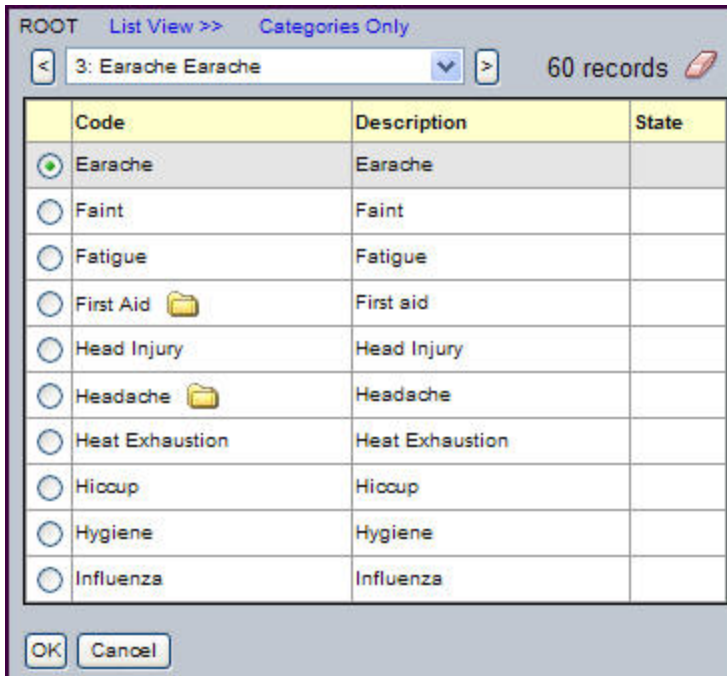
Note: If you use your browser's **Back** button for navigation, you will get errors. Instead, use breadcrumbs and the tabs at the top of every page to navigate the system.

Use Pick Lists

Throughout Aspen, a magnifying glass  appears next to many of the fields. This means that there is a pick list associated with a particular field. For data consistency purposes, you must enter values in these fields from a list of predetermined codes. When you see , you can do either of the following:

- Begin to type the value you want to enter in the field. The system attempts to find a match. For example, assume the school nurse begins to type **Head...** in the **Primary Complaint** field for a health visit. The system completes the entry: **Headache**.
- Click . A pick list appears:

Basic Navigation



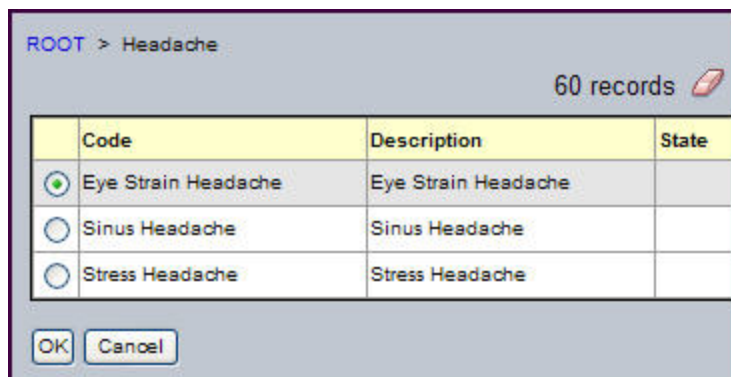
If the reference table associated with the field consists of categories of codes, the top of the pick list displays two options:

- Click **List View** to display a list of all possible values you can enter in the field.
- Click **Categories Only** to display a list of categories. Categories contain groups of related values.

When school years are on the pick list, they are listed in descending order with the most recent year on top.

To select a value, do one of the following:

- Click the button next to a value, such as **Head Injury**, to insert it into the field, and click **OK**.
- Click the folder next to a value to view the available values within that category. For example, if you click next to **Headache**, a list of types of headaches appear:



- Click the button next to a value to select it, and click **OK**.

Using Queries to Find a Group of Records

A query represents a dynamic filter. It helps you search for and filter a group of records that matches specific criteria at a particular time.

For example, you can perform a general search for a group of students with the same year of graduation, or a more specific search for students in the same graduating class in a particular homeroom.

You can also save queries you use often. Or, you can copy queries to use as a shell to create a new query for yourself, or share queries with other users, your school, or your district.

There are three modes of queries:

- **Simple Mode:** These queries search for records based on the system's lists of tables, fields, and operators.

For example, create a Simple query to search for all students graduating in 2012 who are in homeroom 100. After you save this query and run it again, it will always return a list of students graduating in 2012 who are in homeroom 100. Saved Simple queries always search for records based on the same criteria.

- **Advanced Mode:** These queries also search for records based on the system's lists of tables, fields, and operators, but have added functionality. When you use a saved Advanced query, you have the option of changing the search criteria before it completes the search.

For example, create an Advanced query to search for all students graduating in 2012 who are in homeroom 100. After you save this query and run it again, you can change some or all of the search criteria. You can search for students graduating in 2012 who are in homeroom 150. Saved Advanced queries can be changed to search for records based on different criteria than the criteria they were originally created for.

- **Direct SQL Mode:** These powerful queries search for records based on your own self-defined criteria, not the system's tables, fields, and operators. You use SQL syntax to define the criteria; therefore, you are not limited by interface restrictions.

For example, create a Direct SQL query to search for all students who have more than one absence this year.

In Simple and Advanced modes, you can also create parenthesized queries to manage and group complex search conditions. Parentheses allow you to group criteria, resulting in a more powerful search tool.

With a parenthesized query, a single search produces results that would require multiple queries using the basic method. For example, you can search for records that meet the following conditions:

- all females who are in homeroom 287; **or**
- all females who are in homeroom 360; **and**
- whose graduation year is 2010; **or**
- whose graduation year is 2011.

Create Simple Mode Queries

Simple mode queries search for records based on the system's lists of tables, fields, and operators.

For example, create a Simple query to search for all students graduating in 2012 who are in homeroom 100. After you save this query and run it again, it will always return a list of students graduating in 2012 who are in homeroom 100. Saved Simple queries always search for records based on the same criteria.

To create a Simple query:


1. Go to a list page, such as the Student List.
2. On the **Options** menu, click **Query**. The New Query dialog box appears:

The screenshot shows the 'New Query' dialog box with the following configuration:


- Mode:** Simple Mode (highlighted with a red circle)
- Tables:** Student
- Fields:** Year of graduation (selected), Grade level, Homeroom, Home Phone, Enrollment status, Locker
- Operator:** Equals
- Value:** 2012
- Search criteria:** Year of graduation Equals 2012
- Search based on:** All Active Students

Buttons visible include: Search, Cancel, New, Save As..., Select..., And, Or, Delete, and (-).

3. Use the following table to complete the fields:

Field	Description
Tables	<p>Select the table you want to search information in. The table you select determines the Fields selections.</p> <p>For example, if you select the Student table, fields such as Year of graduation and Last name appear.</p>
Fields	<p>At Fields, select the field you want to include in the search criteria.</p> <div style="background-color: #4a86e8; color: white; padding: 10px; border: 1px solid #4a86e8;"> <p>Note: Fields within each reference table are listed from most commonly used to least commonly used. To change this order to alphabetical, click the Alpha Sort button </p> </div>
Operator	<p>Select an operator.</p> <p>For example, if you are searching for students with a specific year of graduation, select Year of graduation in the Fields box, and select the Equals operator.</p> <div style="background-color: #4a86e8; color: white; padding: 10px; border: 1px solid #4a86e8;"> <p>Note: Use the In operator to search for multiple values in one query. In the Value field, type the values separated by a semicolon and no spaces.</p> <p>For example, to search for all students in homerooms 101 and 102, use Operator = In, and Value = 101;102</p> </div>
Value	<p>Enter the value you are searching for.</p> <p>For example, 2010.</p>

4. In the **Tables** field, select the table you want to search information in. The table you select determines the **Fields** selections. For example, if you select the **Student** table, fields such as **Year of graduation** and **Last name** appear.
5. At **Fields**, select the field you want to include in the search criteria.

Note: Fields within each reference table are listed from most commonly used to least commonly used. To change this order to alphabetical, click the **Alpha Sort** button 

6. Click **Add** to add the criteria to the **Search criteria** box.
7. To delete the criteria from this search, highlight it and click **Delete**. Or you can add other criteria, or click **Search** to search for students who match the one criterion you defined.
8. To add other criteria, select the **Table**, **Field**, and **Operator**, and enter the **Value**, if appropriate. Then, click **And** or **Or** to determine if the students should meet the first criteria, the second criteria, or both to be included in the search:

New Query Simple Mode ▾

Tables: Student ▾

Fields: Homeroom (selected), Home phone, Enrollment status, Locker, Phone 2, Phone 3 ▾ Sort A-Z

Operator: Equals ▾

Value: 101

Search criteria

Year of graduation Equals 2012
And Homeroom Equals 101





Search based on: Active Students ▾

Buttons: Search, Cancel, New, Save As..., Select..., And, Or, Delete, (-)

9. At **Search based on**, select the records you want to search on to determine which records are included in this query.
10. If you want to save this query to use it again or to give other users access to it, click **Save As**. The **Save As** dialog box appears:


Name	<input type="text"/>
<u>Query</u>	
Owner type	User <input type="button" value="v"/>
Owner name	Administrator, Joe <input type="button" value="🔍"/>
<u>Filter</u>	
Save as filter	<input type="checkbox"/>
Owner type	User <input type="button" value="v"/>
Owner name	Administrator, Joe <input type="button" value="🔍"/>
Move to top of my list	<input type="checkbox"/>

11. Use the following table to complete the fields:

Field	Description
Name	Type a name for the query.
Query Owner type	Click the drop-down to select one of the following: <ul style="list-style-type: none"> • User: to give a user or yourself access to the query • School: to give users at a school access to the query • Intermediate Organization: to give all users in an intermediate organization access to the query • District: to give all users in the district access to the query
Query Owner name	Click  to change the owner of the query. The owner can edit a saved query.
Save as filter	Select this checkbox to have this query automatically appear on the Filter menu  on this page for all users who are given access to it. If this is selected, the next three fields are accessible.
Filter Owner type	Click this drop-down to select one of the following: <ul style="list-style-type: none"> • User: to give a user or yourself access to the filter • School: to give users at a school access to the filter • Intermediate Organization: to give all users in an intermediate organization access to the filter • District: to give all users in the district access to the filter
Filter Owner name	Click  to change the owner of the filter. The owner can edit a saved filter.
Move to top of my list	Select this checkbox to have this filter appear first on your Filter menu  . <div style="background-color: #4a86e8; color: white; padding: 5px; margin-top: 10px;">Notes:</div> <ul style="list-style-type: none"> • Including queries on your Filter menu allows you to quickly select a group of records when you access a list page. • If a query is first on your Filter menu, it becomes your default filter.

12. Click **Save**.
13. Click **Search**. The list page displays the records that meet your search criteria.

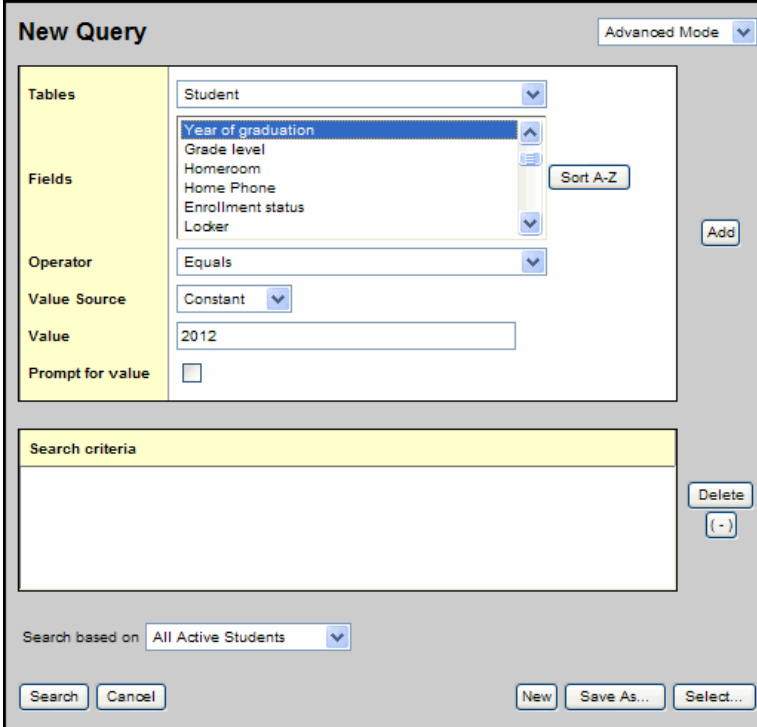
Create Advanced Mode Queries

Advanced mode queries search for records based on the system's lists of tables, fields, and operators, but have more functionality than Simple queries. When you use a saved Advanced query, you have the option of changing the search criteria before it completes the search. And you can save an Advanced query as a filter so it appears on your **Filter** menu . You then can easily run it from there, and you'll be prompted to enter the values. This allows you to create the query once, but use it for multiple purposes.

For example, create an Advanced query to search for all students graduating in 2012 who are in homeroom 100. After you save this query and run it again, you can change some or all of the search criteria. You can search for students graduating in 2012 who are in homeroom 150. Saved Advanced queries can be changed to search for records based on different criteria than the criteria they were originally created for.

To create an Advanced query:

1. Go to a list page, such as the Student List.
2. On the **Options** menu, click **Query**. The New Query dialog box appears.
3. In the upper-right corner, select **Advanced Mode** from the drop-down:



The screenshot shows the 'New Query' dialog box with the following configuration:

- Mode:** Advanced Mode (selected in the top right dropdown)
- Tables:** Student (selected in the dropdown)
- Fields:** Year of graduation (selected in the list, with a 'Sort A-Z' button next to it)
- Operator:** Equals (selected in the dropdown)
- Value Source:** Constant (selected in the dropdown)
- Value:** 2012 (entered in the text field)
- Prompt for value:**
- Search criteria:** An empty list box with a 'Delete' button and a '(-)' button to its right.
- Search based on:** All Active Students (selected in the dropdown)
- Buttons:** Search, Cancel, New, Save As..., Select...

4. At the **Tables** field, select the table you want to search information in. The table you select determines the available selections in the **Fields** box. For example, when you select the **Student** table, fields such as **Year of graduation** and **Last name** appear.
5. At **Fields**, select a field you want to include in the search criteria.

Note: Fields within each reference table are listed from most commonly used to least commonly used. To change this order to alphabetical, click the **Alpha Sort** button



6. At the **Operator** field, select an operator. For example, to search for students with a specific year of graduation, select the following:
7. **Fields:** Year of graduation
8. **Operator:** Equals
9. The **Value Source** field tells the query to either compare your **Fields** selection to what you enter in the **Value** field, or to compare it to another value available in the system when the query is run. Select one of the **Value Source** selections listed in the following table. Your selection in the **Value Source** field determines the behavior of the **Value** field.

Note: For additional help using these selections, see your Aspen system administrator.

Value Source selection	Description / Function	Example	Value field Behavior
Constant	<p>Compares your Fields selection to the Value you enter, compares two values in the same record.</p> <p>Note: Simple Mode queries are always Constant.</p>	<p>The front office needs a list of students graduating in 2012 who are in homeroom 100.</p>	<p>Value: Enter the value the query is comparing to your Fields selection.</p> <p>Prompt for value: Select if you want the option of changing the value when you run the query again.</p> <p>Note: This prompt is enabled only for Constant and Default value sources.</p>
Default	<p>Compares your Fields selection to a date relative to the current date, such as the current week, the current year, the current school quarter, and the current school year.</p>	<p>On a daily basis, the front office staff needs to find all students absent on the current day.</p>	<p>Value: Enter the value the query is comparing to your Fields selection.</p> <p>Prompt for value: Select to have the option of changing the value when the query is run again.</p> <p>Note: This prompt is enabled only for Constant and Default value sources.</p>
Preference	<p>Compares your Fields selection to a system preference value.</p> <p>Note: The system preferences are set up by your Aspen administrator.</p>	<p>A superintendent needs a list of all students with an "active" enrollment code at the high school. If the high school principal changes</p>	<p>Value: Enter the value the query is comparing to your Fields selection.</p>

Value Source selection	Description/Function	Example	Value field Behavior
		the "active" code from "A" to "E", this query will continue to run and produce accurate results.	
Session	<p>Compares your Fields selection to a value from the current system and user session. These values are variable, such as the time the user logged on, or the school being viewed.</p> <div style="border: 1px solid black; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p>Note: Using this value source is for advanced users, administrators, customizations, and support purposes.</p> </div>		Value: Enter the value the query is comparing to your Fields selection.

10. If you select the **Prompt for value** checkbox, the following 'Search criteria' dialog box appears when the query is run. This gives the user the option of changing the value in the search criteria:

Search criteria





Homeroom	<input style="width: 90%;" type="text" value="101"/>
Year of graduation	<input style="width: 90%;" type="text" value="2012"/>

Note: If you provide a value in addition to selecting the **Prompt for value** checkbox, the value will be used as a default in the 'Search criteria' dialog box.

11. Click **Add** to add the criteria to the **Search criteria** box.
12. Click **Delete** if you want to delete the criteria from this search. Otherwise, you can either add other criteria, or click **Search** to search for students who match the one criterion you defined.
13. To add other criteria, select the **Table**, **Field**, and **Operator** and enter the **Value**, if appropriate. Then, click **And** or **Or** to determine if the students should meet the first criteria, the second criteria, or both to be included in your search:

14. At **Search based on**, select the records you want to search on to determine which records are included in this query.
15. Click **Save As** to save the query so you can use it again or to give other users access to it:

16. Use the following table to fill in the fields:

Field	Description
Name	Type a name for the query.
Query Owner type	Click this drop-down to select one of the following: <ul style="list-style-type: none"> • User: to give a user or yourself access to the query • School: to give users at a school access to the query • Intermediate Organization: to give all users in an intermediate organization access to the query • District: to give all users in the district access to the query
Query Owner name	Click  to change the owner of the query. The owner can edit a saved query.
Save as filter	Select this checkbox to have this query automatically appear on the Filter menu  on this page for all users who are given access to it. If this is selected, the next three fields are accessible.
Filter Owner type	Click this drop-down to select one of the following: <ul style="list-style-type: none"> • User: to give a user or yourself access to the filter • School: to give users at a school access to the filter • Intermediate Organization: to give all users in an intermediate organization access to the filter • District: to give all users in the district access to the filter
Filter Owner name	Click  to change the owner of the filter. The owner can edit a saved filter.
Move to top of my list	Select this checkbox to have this filter appear first on your Filter menu  . <div style="background-color: #4a86e8; color: white; padding: 5px; margin-top: 10px;">Notes:</div> <ul style="list-style-type: none"> • Including queries on your Filter menu allows you to quickly select a group of records when you access a list page. • If a query is first on your Filter menu, it becomes your default filter.

17. Click **Save**.

18. Click **Search**. The list page displays the records that meet your search criteria.

Create Direct SQL Queries

Direct SQL mode queries search for records based on your own self-defined criteria, not the system's tables, fields, and operators. You use SQL syntax to define the criteria; therefore, you are not limited by interface restrictions.

For example, create a Direct SQL query to search for all students who have more than one absence this year.

To create a Direct SQL query:

1. Go to a list page, such as the Student List.
2. On the **Options** menu, click **Query**. The New Query dialog box appears.
3. In the upper-right corner, click the drop-down to select **Direct SQL Mode**.
4. In the box, enter the query in SQL:

New Query Direct SQL Mode

```
SELECT * FROM STUDENT
WHERE STD_OID IN
(SELECT ATT_STD_OID
FROM STUDENT_ATTENDANCE
WHERE ATT_DATE > '2012-09-10'
AND ATT_DATE < '2013-06-30'
AND ATT_ABSENT_IND = "1"
GROUP BY ATT_STD_OID
HAVING COUNT(*) > 5)
```

Search based on All Active Students Cache results to increase performance

Search Cancel New Save As... Select... Validate

Note: When running a saved SQL query, the **Prompt for Value** token can be entered into the SQL in place of a comparison value. This allows users to enter values on the 'Search criteria' dialog at run time. See [Tips for entering the "Prompt for Value" Token](#) for more details.

5. At the **Search based on** field, select the records you want to search on to determine which records are included in this query.
6. Select the **Cache results to increase performance** checkbox if you want the system to cache the results of a large query to make scrolling through the pages of results faster. Essentially, this prevents the system from having to re-run the query each time you view another page of results.
7. Click **Search** to use the query, or **Save As** to save the query for future use.

Tips for entering the "Prompt for Value" token:

1. Use brackets and the keyword **"prompt"** to indicate a prompted value the user will be asked for when the query is used.
2. The general format for a prompt token is:

```
{ prompt : field ID : default type : default value : label }
```

3. When entering a prompt value for a text field, enclose the prompt with quotes just as you would enclose a constant value in quotes.

For example: Where PSN_NAME_FIRST = '{prompt}'

4. When entering a prompt for a numeric value, the prompt should not have quotes. It should appear just as a number would in the query.

For example: Where ACT_PENALTY_TIME {prompt}

5. In general, the query should be written as if the user-entered text would be placed exactly where the prompt command is.

SQL without "Prompt for Value" field	SQL with "Prompt for Value" field
<pre>SELECT * FROM STUDENT WHERE STD_HOMEROOM = '101'</pre>	<pre>SELECT * FROM STUDENT WHERE STD_HOMEROOM = ' {prompt}'</pre>

SQL Syntax for...	Function
Prompt	<ul style="list-style-type: none"> Constant, must be "prompt"
Field ID	<ul style="list-style-type: none"> Data Dictionary ID for a field Determines the type of value to be retrieved and the label to appear before the prompt Field ID can also be one of the following constants and will result in an appropriate input for the type: Text: Input field for text Character: Input field for text Integer: Input field for an integer Number: Input field for a number. Decimal places are allowed. Date: Input field for a date, with date picker Time: Input field for a time value Logical: Checkbox field. This field will produce a zero (0) or one (1) in the generated SQL, which is appropriate for all logical database fields. It might not correspond to other Boolean operations in SQL.
Default type (optional)	<ul style="list-style-type: none"> Type of default value that should appear in the prompt screen. Allows users to keep this value or replace it with their own. Can be blank if there is no default; or can be either const or default. See the following table on Default type = default.
Default value (optional)	<ul style="list-style-type: none"> Default value to appear in the field's prompt. If default type is const, this is a suitable input value for comparison.
<p>Note: Default type and Default value can be left empty if they are not needed, but their positions should be marked with a colon (:) if the label is used and they are not.</p>	
Label (optional)	<ul style="list-style-type: none"> Label displays when user is prompted for input value. If this is not present, the label will come from the user label on the field Id.

When Default type = default, a relevant value is looked up and placed as the Default value:

Default Value	Function
today	current date
now	current date (same as "today")
districtYearEnd	last day of district school year
districtYearStart	first day of district school year
firstOfMonth	first day of current month
firstOfWeek	first day of current week
lastOfMonth	last day of current month
<p>Note: The following are only useful in the School view and retrieve values for the current school:</p>	
currentGradeTerm	current grade term
schoolStartGrade	school start grade
schoolEndGrade	school end grade

Examples of prompt commands in SQL:

Prompt	Function
<code>{prompt:stdHomeroom}</code>	<ul style="list-style-type: none"> prompts for homeroom value with label from homeroom field
<code>{prompt:psnLastName:</code>	<ul style="list-style-type: none"> prompts for last name include the default of "Jones" when prompting user
<code>{prompt:psnDob:default:today}</code>	<ul style="list-style-type: none"> prompts for date of birth displays the default value of current day
<code>{prompt:psnEmail01:::Main Email Address}</code>	<ul style="list-style-type: none"> prompts for an email address use the label "Main Email Address" in prompt entry screen
<code>{prompt:Text:const:Mary:Student first name}</code>	<ul style="list-style-type: none"> prompts with field for text entry default with value and label
<code>{prompt>Date:default:today}</code>	<ul style="list-style-type: none"> prompts with field for date entry default value for today

Understanding Queries, Snapshots, and Filters

Queries, snapshots, and filters are ways to filter any list, such as the Student List or the Staff List.

Query


A query is a dynamic filter. Use a query to search for a group of records one time. If you use the same query criteria again, it might not produce the same list of records. For example, you can use a query to search for all ninth-graders who have a GPA equal to or higher than 3.0. Because a student's GPA can change with each grade term, the group of students that the query gathers could be different each time you use it.

Snapshot

A snapshot represents a static filter. Use a snapshot to take a picture of a group of records you will need to access regularly, or need to save. For example, assume you want to save the group of students the query above finds to determine your Quarter 1 Honor Roll. Once you create the snapshot — think of a picture taken with a camera — the group of students in the snapshot never changes.

Therefore, if you create a snapshot of students in your homeroom today, and a new student registers tomorrow, your snapshot does not contain that new student. But you can modify a snapshot manually.

Filters

There are default filters and custom filters. Default filters are available from every list page. You can also create your own filters when you make a snapshot or query. You have the option of saving a snapshot and a query as a filter so you can use it again. You will be able to easily access the filter by clicking  and selecting the filter you created to view the list of records.

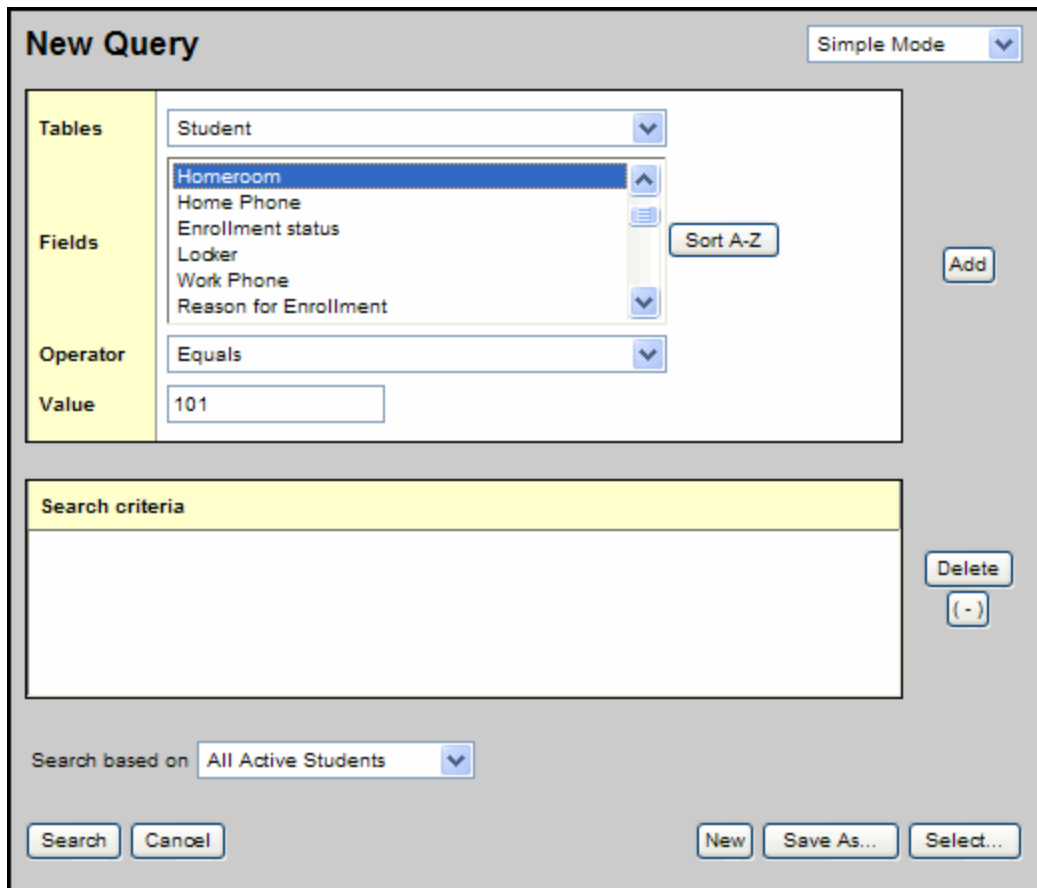
Use, Copy, Edit, and Delete Saved Queries

Queries help you search for and filter a group of records that matches specific criteria at a particular time. Your Aspen system administrator has most likely created a number of queries for your district.

Note: Do not select **All Records** from your **Filter** menu if your next step will be to run a query. Instead, select **All Records** in the Search based on list on the Query window. Not only does this save a page refresh, it also prevents a potentially large list of records from being loaded unnecessarily.

To use, copy, edit, or delete a saved query:

1. Go to a list page, such as the Student List.
2. On the **Options** menu, click **Query**. The New Query dialog box appears:



New Query Simple Mode

Tables Student

Fields Homeroom
Home Phone
Enrollment status
Locker
Work Phone
Reason for Enrollment

Operator Equals

Value 101

Search criteria

Search based on All Active Students


Search Cancel New Save As... Select...

3. Click **Select**. The Query Pick List appears:

	Name	OwnerType
<input checked="" type="radio"/>	1 student per Phone, Address	District
<input type="radio"/>	2010 YOG	User
<input type="radio"/>	Active SPED Students	District
<input type="radio"/>	Begins with a	User
<input type="radio"/>	Counselor = Mr. Jones	School
<input type="radio"/>	Counselor = Mr. Owens	School
<input type="radio"/>	Counselor = Ms. Adler	School
<input type="radio"/>	Counselor = Ms. Parker	School
<input type="radio"/>	Counselor = Ms. Reyes	School
<input type="radio"/>	Female 10th Grade	User

4. Select the query you want to use.
5. Do one of the following:
- Click **Use** to run the query, then click **Search**.
 - Click **Copy** to use the saved query as a shell to create a new one. Change the query name, owner type, and owner name as needed. Click **Save**.
 - Click **Edit** to change the query name, owner type, and owner name. Then click **Save**. The edits made apply to all users who have access to this query.

Note: You might not have security privileges to copy queries to other users in your school or district, or for your entire school or district. See your Aspen administrator for more information.

- Click **Delete** to remove the query. The query will be deleted from the Filter menu  of all users who have access to it.
6. If you are using a saved Advanced or Direct SQL query and **Prompt for value** had been selected, the 'Search criteria' dialog box appears:

Search criteria	
Homeroom	101
Year of graduation	2012

Submit Close

7. Enter the search criteria, and click **Submit**. The list page displays the records that meet your search criteria

Name Advanced and SQL Queries

For queries that have prompts, it is helpful to have the query name include the value that the user entered. To do so, when you save the query, include a question mark (?) within its name.

Example: Homeroom ?

A user who selects this query is prompted to enter values for each prompt. After values are entered and the query is run, the new filter appears on the query list with the value the user entered in place of the question mark.

For example, the user is prompted for a homeroom. He enters **101**. After running the query, the list displays students in homeroom 101 and the filter name on the page is now **Homeroom 101**. The question mark in the query name is replaced by **101**.

Create Parenthesized Queries

In Simple and Advanced modes, you can also create parenthesized queries to manage and group complex search conditions. Parentheses allow you to group criteria, resulting in a more powerful search tool.

With a parenthesized query, a single search produces results that would require multiple queries using the basic method.

For example, you can search for records that meet **one** of the following two conditions:

- all females who are in homeroom 287; or
- all females who are in homeroom 360;

and one of the following two conditions:

- whose graduation year is 2010; or
- whose graduation year is 2011.

Using a basic query, this same search would require three separate queries.

To create a parenthesized query:

1. Go to a list page, such as the Student List.
2. On the **Options** menu, click **Query**. The New Query dialog box appears.
3. Enter your first criteria, such as Gender equals female.
4. Click **Add** to add the criteria to the **Search criteria** box.
5. Enter your next criteria, such as Homeroom equals 101.
6. Click **And** or **Or** to determine if students should meet the first criteria and the second criteria, or the first criteria or the second criteria.
7. Enter your next criteria, such as Homeroom equals 151.
8. Click to highlight the criteria that you want to put in parentheses, such as the homeroom lines.

Notes:

- When you put parentheses around criteria, you are telling the system to calculate the results of this set of criteria. This calculation is then factored into the total query equation.
- To select multiple lines, click and hold the **Shift** key; then click the desired lines.

9. Under **Delete**, click the **Parentheses** button  to put these criteria in parentheses:

New Query Advanced Mode

Tables Student

Fields Homeroom
Home Phone
Enrollment status
Locker
Work Phone
Reason for Enrollment

Operator Equals

Value Source Constant

Value 151

Prompt for value

Search criteria

Gender Equals F
And (Homeroom Equals 101
Or Homeroom Equals 151)

Search based on All Active Students

Search Cancel New Save As... Select...

10. Click **And** or **Or** to tell the system how you want it to handle the next criteria you enter in relation to the previous one.
11. Enter your next set of criteria, as you did in steps 6-8.
12. To nest this set of criteria, select the lines to highlight them and click :

New Query Advanced Mode ▾

Tables	Student ▾	
Fields	Year of graduation (selected) ↑ Grade level Homeroom Home Phone Enrollment status Locker	Sort A-Z
Operator	Equals ▾	
Value Source	Constant ▾	
Value	2011	
Prompt for value	<input type="checkbox"/>	

Search criteria


Gender Equals F
 And (Homeroom Equals 101
 Or Homeroom Equals 151)
 And (Year of graduation Equals 2010
 Or Year of graduation Equals 2011)

Search based on All Active Students ▾

Search Cancel New Save As... Select...

13. At **Search based on**, select the records you want to search on to determine which records are included in this query.
14. If you want to save the query to use it again, click **Save As** and enter the information.
15. Click **Search**. The list page displays the records that meet your search criteria:

Student List

0 of 8 selected  Custom Selection

<input type="checkbox"/>	Name	Address	LASID	YOG	DOB	Grade	Hrm	Counselor
<input type="checkbox"/>	Allen, Kendra Lynn	3 Bassett	034070	2010	8/14/1989	10	360	Mrs. D. Boland
<input type="checkbox"/>	Carreiro, Jennifer Anita	4 Pond Street	155451	2010	4/6/1990	10	287	Mr. G. Andrade
<input type="checkbox"/>	Carter, Veronica Lee	83 Coggeshall	179988	2011	8/3/1990	11	360	Ms. B. Martin
<input type="checkbox"/>	Ferreira, Victoria	316 Johnson Street 35D	377751	2010	7/2/1990	10	360	Mrs. E. Sabra
<input type="checkbox"/>	Gagnon, Kuntheanita Lyn	34 Tremont Street	774835	2010	2/21/1990	10	360	Mr. G. Andrade
<input type="checkbox"/>	Kheng, Kiera	9 Penny Pond	168773	2011	3/19/1989	11	287	Ms. P. Farias
<input type="checkbox"/>	Pereira, Marissa	44 Main Street	732953	2010	10/21/1990	10	360	Mrs. M. Rotondo
<input type="checkbox"/>	Spencer, Tiffani	484 Main St 3rd	353256	2010	6/17/1990	10	360	Mr. R. Correia

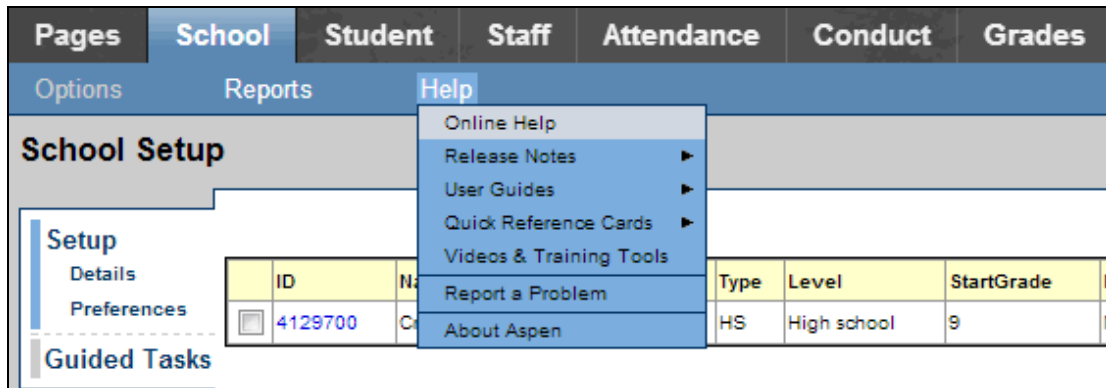
Getting Help

Following are some ways to get help with using Aspen:

- [Use the Help menu](#)
- [Report a problem to your IT Department](#)
- [Recover your password](#)

Use the Help Menu

Go to the **Help** menu to access information that will make using Aspen easier and more efficient. When you have a question about how to do something in the system, come to this menu first:



The **Help** menu contains the following options:

- **Online Help:** Click to view an online help system with instructions on how the system is set up and ways to perform common tasks. A table of contents, index, and search feature make it easy to find the information you need.
- **Release Notes:** Click to view a list of major changes and new features that have been added to the system in recent releases.
- **User Guides:** Click to open a PDF version of all of the Aspen user guides, such as Basic Navigation and Managing Students. Refer to and print these as needed. They are updated with each release.
- **Quick Reference Cards:** Click to access sheets on guided steps or summaries of the most common tasks used. They provide a good refresher after attending a training or a quick way to look up a frequently used feature or process.
- **Videos & Training Tools:** Click to access training toolkits designed to help you learn and teach others about specific features in Aspen. Each toolkit provides a comprehensive overview of one aspect of Aspen using a variety of training materials, including lesson plans, videos, and quick reference guides.
- **Report a Problem:** If your district uses the feature and you have appropriate privileges, the "Report a Problem" option appears. Click to [report a problem to your district's IT department](#).
- **About Aspen:** Click to view which version of the system you are currently using.

Report a Problem to Your IT Department

If your district enables ticket reporting and you have appropriate security privileges, you can report a problem to your IT department directly from Aspen.

To report a problem to your IT department:

1. On any page in the system, click the **Help** menu.
2. Click **Report a Problem**. The Report a Problem dialog box appears:

3. Enter the information the IT department will need to solve your problem.
4. Click **Submit**. This ticket is submitted to Pando, the system the IT department uses to manage Aspen and computer issues in your district.

You are automatically entered as the contact for the issue. When an IT staff member makes changes or progress on your issue, an email is sent to the email address entered when you [set your user preferences](#).

Recover Your Password

If you forget your password and automatic password recovery has been set up on your system, you can retrieve it from the Log On page.

To recover your password:

1. On the Log On page, click **I forgot my password**. The Password Reset dialog box appears.
2. Enter your **Login ID** and **Primary email** address.
3. Click **Continue**. The Password Reset dialog box expands to include the security question you chose when setting up password recovery.
4. Type the response, and click **Submit**. If the answer is correct, Aspen sends a message containing your password to your primary email address.

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