



WSIPC Guide to Skyward's School Management System

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About This Guide

Skyward's School Management System is the Web-based interface of the Skyward product suite. It provides you with online access to all product lines (Educator Access Plus, Employee Access, Family and Student Access, Financial Management, Human Resources, Product Setup, and Student Management,), and to product line modules such as Fiscal Chart of Accounts, Human Resources Payroll, and Student Attendance.

This Guide explains features in Skyward's School Management System that are common across all product lines.

This Guide will help anyone who uses Skyward's School Management System. This includes secretaries, registrars, administrators, business office personnel, payroll personnel and human resource personnel, and may also include teachers and counselors.

Before you begin using the modules in the software and reading other WSIPC Guides, it's important to understand how basic features work in Skyward's School Management System.

What You Should Know Before You Start

You'll find that the Guide is much more helpful if you already understand how to use a Web browser (such as Internet Explorer, Firefox, or Chrome) and basic Web features such as hyperlinks and menus.

Be Sure You're Signed In

To get started, you must know your district's URL for the Skyward's School Management System sign-in screen, and you must have a user account. If you do not have a user account, contact your district administrator.

This Guide is intended to be read while you are working in Skyward's School Management System, so be sure you are signed in. Many of the procedures and concepts discussed in the Guide are best understood if you practice as you read.


How to Use This Guide

This section shows you how to follow navigation paths in a Guide, and how to navigate around the Guide using various features. This section also describes how and when screen shots are used in the Guide.

Navigation Paths

The procedures in this Guide begin with navigation menu paths. Select the Display Navigation Menu Paths check box in User Preferences to ensure that you can follow these paths. The option is not available in User Preferences if it is already enabled for the entire district.

Getting Around

If you're using this Guide electronically, you can click any text in blue font to move to the section of the Guide that the text refers to. Because the Guides are published in PDF format, you can also use the PDF navigation pane to quickly move from one section to another. If the pane is hidden, click the Bookmark button  in the menu bar on the left side of the screen.

Screen shots

You'll find screen shots throughout the guide to help you learn how to use the software. These screen shots are updated with each edition to make sure what you see on your screen matches what you see in the Guide. To prevent the Guide from becoming a lengthy picture book, WSIPC Guides use screen shots only to help illustrate a key idea or when options on a screen are described. This allows WSIPC Guides to be effective *and* concise.

What is in a WSIPC Guide

WSIPC Guides are designed to provide readers with everything they need to know to safely and effectively use Skyward’s software. WSIPC strives to make Guides that address the diverse needs of these audiences. Therefore, this Guide doesn’t contain information customized for specific audiences, districts, or schools.

If you need to create educational materials that address the specific needs of your Service Center or district, consider using this Guide as a starting point for developing your own customized materials.

What’s New in This Edition

This section highlights the significant changes to the Guide since the last edition such as content about new features, important notes and cautions, and sections of the Guide that have been expanded or moved.

Description of Change	Page #
Updated the Guide to reflect WSIPC’s July 2015 software release version 05.15.06.00.02.	N/A
Restructured the Guide for better flow of topics.	N/A
Updated all dates to reflect the 2015-2016 school year.	N/A
Added the “Understanding Common Widget Notifications” sub-section under “Understanding the Home Screen.”	15
Added the “Accessing Setup Options” section under “Accessing Modules.”	20
Added the “Working with Saved Reports” sub-section under “My Print Queue.”	73

Signing In to Skyward's School Management System

To use Skyward's School Management System, you can only access the software through your district's sign-in screen. If you don't know how to get to your district's sign-in screen, or you don't know your username or password, contact your security administrator. Many districts customize their sign-in screen. To learn how to customize the sign-in screen, see the *WSIPC Guide to Configuring Skyward's School Management System Home Screen*.

To sign in to Skyward's School Management System:

1. Open a Web browser.
2. Navigate to your district's sign-in screen for Skyward's School Management System.

Tip Add the site to your Web browser's Favorites list to make it easier to access in the future.

3. Type your username and password.

Tip If you don't know your username or password or have forgotten them, click the [Forgot your Login/Password? Link](#). If this link is not available, contact your district's security administrator.

4. In the Login Area box, select the area of the product you'll work with, such as Secured Access.

Note Most users select All Areas.

5. Click Sign In.



Caution To close your Skyward's School Management System session, click Exit in the upper-right corner of the screen. Otherwise, your Web browser may remain open for an unspecified period of time.

Understanding the Home Screen

Once you sign in to Skyward's School Management System, the Home screen appears. The Home screen appears in all product lines (Educator Access Plus, Employee Access, Financial Management, Human Resources, Product Setup, and Student Management). In Family and Student Access, it is called the Home Wall. To learn how to configure your Home Wall in Family or Student Access, see the *WSIPC Guide to Family and Student Access for Students and Guardians*.

The main area of the Home screen is called the dashboard (Figure 1). A dashboard is a tool that allows you to organize and present information on the Home screen in an easy-to-read format. To learn more about dashboards, see "[Working with Dashboards](#)" (page 7).

The information on a dashboard is contained in pseudo-widgets and widgets (Figure 2). Pseudo-widgets allow you to easily move to other locations in the software. Widgets provide information about your school, district, or an area in the software. To learn more about pseudo-widgets and widgets, see "[Using Pseudo-Widgets](#)" (page 11) and "[Managing Widgets](#)" (page 11).

To learn how to configure your Home screen, see the *WSIPC Guide to Configuring Skyward's School Management System Home Screen*.

Understanding the Home Screen

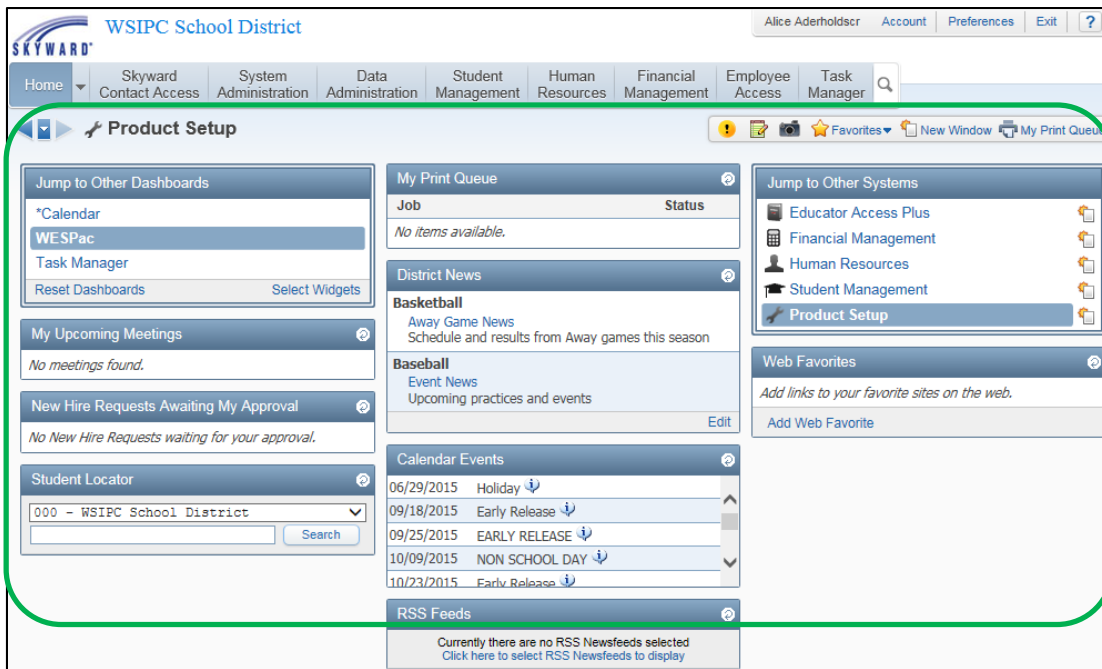


Figure 1 - Dashboard on the Home screen in Product Setup

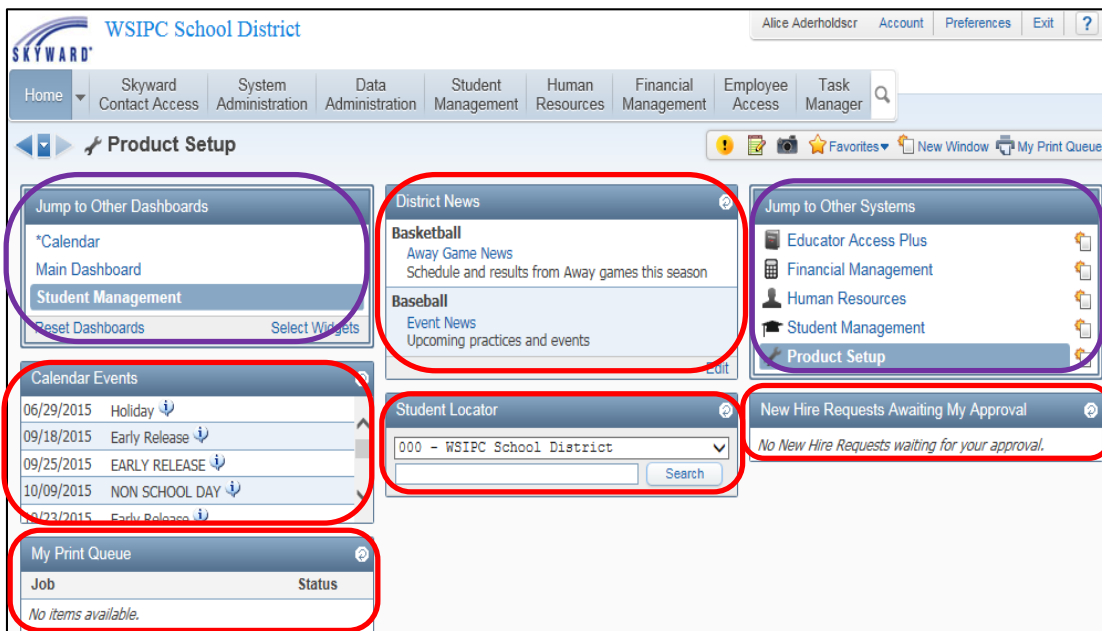


Figure 2 - Widgets and pseudo-widgets on the Home screen in Product Setup. The areas outlined in red are widgets and the areas outlined in purple are pseudo-widgets.

Working with Dashboards

The dashboard is the main area of the Home screen. You can create several dashboards and personalize them.

Note Your district can provide all users with access to a Calendar dashboard. To learn about the Calendar dashboard, see “[Managing the Calendar Dashboard](#)” (page 9).

Viewing a Dashboard

You can view any of your dashboards from the Home screen in any product line.

To view a dashboard:

- Click the Home tab.

To switch between dashboards:

1. If you are not already on the Home screen, click the Home tab.
2. In the Jump to Other Dashboards pseudo-widget on the left side of the dashboard, click the dashboard you want to view.

Adding a Dashboard

Your Home screen can contain six dashboards in addition to the Calendars dashboard. You may want to add separate dashboards that contain widgets for each product line.

To add a dashboard:

1. In the Jump to Other Dashboards pseudo-widget, click Select Widgets.
2. Click Add Dashboard.
3. In the Please enter the dashboard name box, type the name of the new dashboard.
4. Click Save. The new dashboard appears as a new tab on the Dashboard Maintenance screen (Figure 3).

Tip To reorder the dashboards in the Dashboard Maintenance screen, drag and drop the tabs.

From the Dashboard Maintenance screen, you can add widgets to your new dashboard. To learn how to add widgets, see “[Adding Widgets](#)” (page 13).

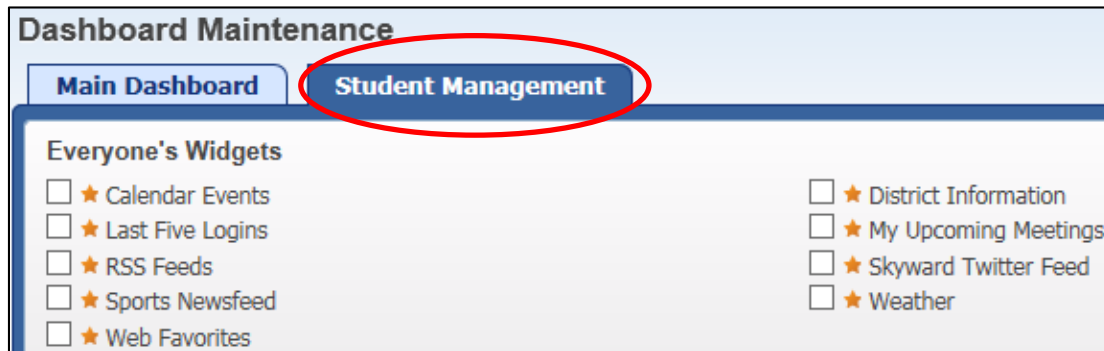


Figure 3 - A new dashboard named “Student Management” appears as a new tab on the Dashboard Maintenance screen.

Managing Your Dashboards

You can rename, delete, and reset any dashboard except the Calendar dashboard.

To manage your dashboards:

1. In the Jump to Other Dashboards pseudo-widget, click Select Widgets.
2. Click the tab for the dashboard you want to rename, delete, or reset.
3. Do one of the following:
 - To rename a dashboard, click Rename Selected Dashboard, type a new name for the dashboard, and click Save.
 - To delete a dashboard, click Delete Selected Dashboard. Click Yes when the confirmation message appears.
 - To reset selected widgets on a dashboard, click Reset Selected Dashboard.
4. Click Save to exit the Dashboard Maintenance screen.

Managing the Calendar Dashboard

If your district enables the Calendar dashboard, it appears as the first dashboard in the Jump to Other Dashboards pseudo-widget. To learn how to enable the Calendar dashboard, see the *WSIPC Guide to Configuring Skyward's School Management System Home Screen*.

Note You cannot rename or delete the Calendar dashboard because it is a default dashboard. The asterisk before the dashboard's name indicates that you can't rename or delete this dashboard (Figure 4).



Figure 4 - The Calendar dashboard in the Jump to Other Dashboards pseudo-widget. The asterisk before the dashboard's name indicates that you can't rename or delete this dashboard.

The Calendar dashboard contains a calendar that shows events pertaining to your role (Figure 5). For example, a student might see Attendance Records on the calendar, or an employee might see Time Off requests. Table 1 describes the actions you can perform from the Calendar dashboard.

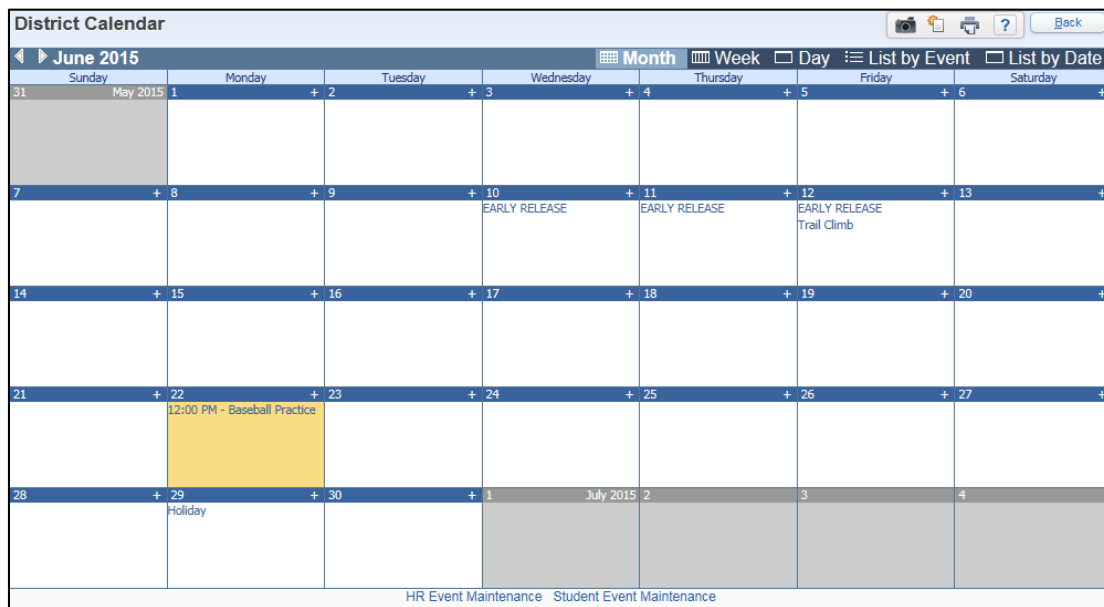


Figure 5 - District Calendar dashboard

Action	Process
View the Calendar dashboard	Click Calendar in the Jump to Other Dashboards pseudo-widget on the Home screen. To close the Calendar dashboard, click Back.
Select a Calendar view	Click a button at the top of the toolbar (Month, Week, Day, List by Event, and List by Date) to select a calendar view.
View event details	In a calendar day, click a calendar event. The Calendar Event screen opens and displays the event's details.
Download an event to your personal calendar	After selecting a calendar event, click Add this event to your personal calendar to import it to your personal calendar. The event is downloaded in .ics format, which is compatible with Google Calendar and Microsoft Outlook. Click Back to return to the calendar.

Action	Process
Add an event	Click the plus sign on a calendar day. Configure the Personal Event Maintenance screen and click Save. Note: You can't add an event in the List by Event view.
Edit an event	Select a calendar event you created and click Edit this event or on the Personal Event Maintenance screen.
Delete an event	Select a calendar event you created, and click Edit this event and then click Delete. When the Confirm Delete message appears, click Yes.
View events by product line	Click a <product line> Event Maintenance link below the calendar to view all events for that product line.

Table 1 - Actions you can perform from the Calendar dashboard

Using Pseudo-Widgets

Pseudo-widgets allow you to jump to other locations in the software. There are two pseudo-widgets: Jump to Other Dashboards and Jump to Other Systems (Figure 6). Pseudo-widgets appear on all dashboards (except the Calendar dashboard). You cannot configure them, move them, or remove them from your dashboard.

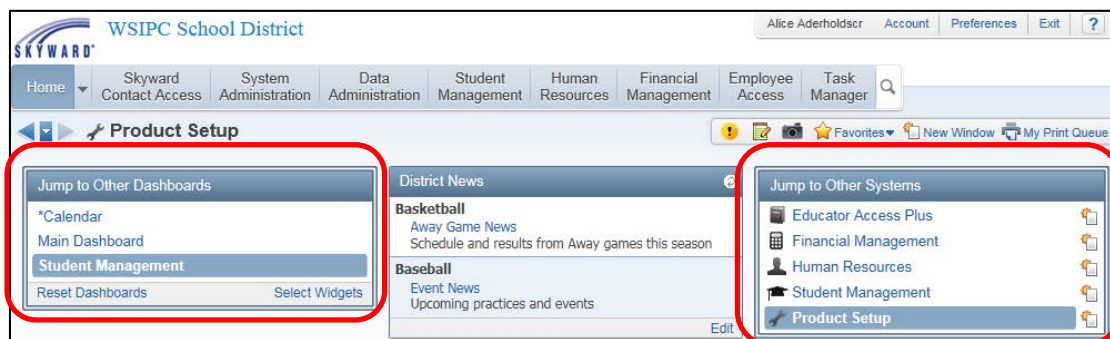


Figure 6 - The Jump to Other Dashboards and the Jump to Other Systems pseudo-widget

Managing Widgets

The information on a dashboard is contained in widgets. A widget provides information about your school, district, or an area of the software. For example, the District News widget contains information about the district. Some widgets are set as defaults by your district. Default widgets automatically appear on your Dashboard Maintenance screen.

If your district has made new widgets available, the Suggested Widgets screen appears the next time you visit the Home screen.

Using the Widget Title Bar

The title bar of a widget is the dark blue bar at the top of the widget. The title bar contains the name of the widget. If the widget title becomes underlined when you pause your mouse pointer over it, you can click the widget title to go to that area or module. For example, clicking My Print Queue takes you to your Print Queue (Figure 7).

The title bar contains a Refresh button on the right (Figure 7). If the widget is minimized, you must click the Maximize button to access the Refresh button. When you pause your mouse pointer over the Refresh button, up to four additional buttons in the title bar. Table 2 describes the buttons available in the title bar of a widget.



Figure 7 - The title bar of the My Print Queue widget. If the widget title becomes underlined when you pause your mouse pointer over it, you can click the name to go to that area or module.







Button	Description
Remove 	Removes the widget from the dashboard. If a widget is on several dashboards, clicking Remove only removes the widget from the dashboard you are viewing.
Options 	Configures the widget.
Information 	Provides a brief description of the widget.
Minimize 	Hides the contents of a widget. When minimized, only the widget's title bar is visible.
Maximize 	Shows the contents of a widget. The Maximize button appears only when the contents of a widget are hidden. This button appears in place of the Refresh button when the widget is minimized.
Refresh 	Refreshes the contents of the widget.

Table 2 - Buttons in the widget title bar

Adding Widgets

Your role determines which widgets you can add. You decide which widgets appear on your dashboard. For example, if you are a teacher, you can add Teacher widgets to your dashboard.

To add widgets:

1. In the Jump to Other Dashboards pseudo-widget, click Select Widgets.
2. Click the tab for the dashboard you want to configure.
3. Select the check boxes next to the widgets you want to appear on the dashboard.

Note	When your district adds a new widget, the New button may appear next to the widget name.
-------------	--

4. Click Save.

Removing Widgets

You can remove any widget from a dashboard. There are two ways to remove widgets from a dashboard. Both ways are described in this section.

To remove a single widget from the current dashboard:

- Click the Remove button  on the widget's title bar.

To remove many widgets from a dashboard:

1. In the Jump to Other Dashboards pseudo-widget, click Select Widgets.
2. Select the dashboard that you want to remove the widgets from by clicking the tab for that dashboard.
3. Do one of the following:
 - Clear the check boxes next to the widgets you want to remove from the dashboard.
 - Click Uncheck All Items to remove all widgets from the dashboard.
 - Click Reset Selected Dashboard to include only the widgets that your district selected to appear by default.
4. Click Save.



Caution

Clicking Reset Dashboards in the Jump to Other Dashboards pseudo-widget resets *all* your dashboards. This action deletes any dashboards you have created. If you renamed the default dashboard (the dashboard set up by your district), the dashboard name is returned to the default name. The default dashboard contains only the default widgets.

Moving Widgets

The dashboard is divided into three columns. Each widget is automatically placed in one of the three columns. However, you can move all widgets to a new location on the same dashboard.

To move a widget:

1. Pause your mouse pointer over an empty area of the title bar (of the widget you want to move). Your mouse pointer becomes a four-pointed arrow.
2. Click and hold your left mouse button.
3. Drag the widget to a new location.
4. Release the left mouse button.

Understanding Common Widget Notifications

There are times when a notification symbol may appear next to a widget title. The various symbols notify you of processes or tasks that require attention, and to confirm that a process or task is complete.

Examples:

- The exclamation point indicates that a task needs your attention (Figure 8).
- The green checkmark indicates that a process or task has successfully completed (Figure 9).
- The caution flag indicates that a process or task needs your attention (Figure 10). A caution flag can be red or yellow.

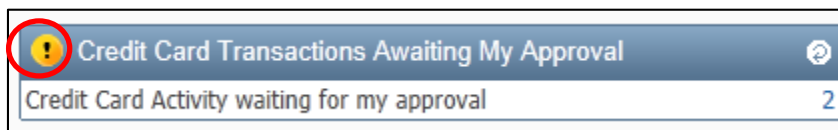


Figure 8 - Example of a Credit Card Transaction that needs approval

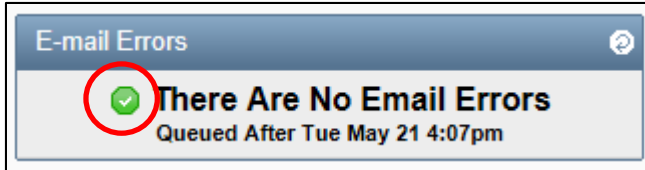


Figure 9 - Example of the Email History widget confirming that no email errors need to be resolved

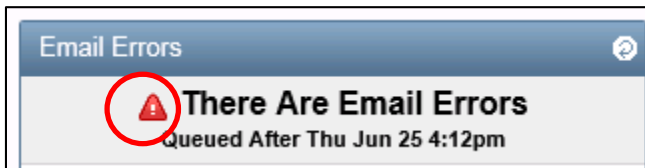


Figure 10 - Example of the Email History widget where unsent emails require attention

Navigating in Skyward's School Management System

Navigating in Skyward's School Management System works in the same way for all product lines (Educator Access Plus, Employee Access, Financial Management, Human Resources, Product Setup, and Student Management).

Note To learn how paths are documented in WSIPC Guides, see "[Using Paths in WSIPC Product Guides](#)" (page 102).

Selecting a Product Line

After you sign in to Skyward's School Management System, a row of tabs appears at the top of the Home screen (Figure 11). The Home tab appears for all product lines.

Note The product line you were viewing when you previously signed out of the system is the product line you see when you next sign in to the system.

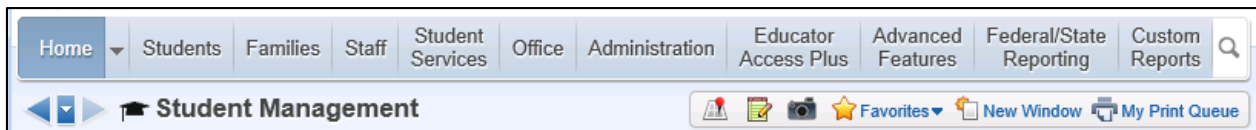



Figure 11 - A row of tabs appears when you sign in to Skyward's School Management System

To select a product line:

1. Click the arrow to the right of the Home tab . The menu containing the available product lines appears (Figure 12).

Note The currently selected product line is always bolded.

2. Select a product line.

Tip Use the Jump to Other Systems pseudo-widget on the Home screen to move to other product lines. Your security level determines which product lines you see.

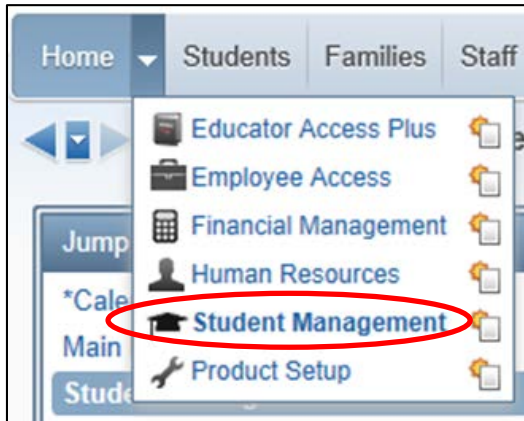


Figure 12 - Product line selection menu (the currently selected product line is always bolded)

Note Family Access and Student Access do not appear in the product line selection area. To learn about Family Access and Student Access, see the *WSIPC Guide to Family and Student Access for Students and Guardians*.

Accessing Modules

After you select a product line, tabs appear that represent modules specific to the product line. Your security level determines which tabs you see and the modules available within each tab.

In Figure 13, the Financial Management product line is selected. Tabs related to that product line (such as Vendors, Inventory and Accounts Payable) appear.

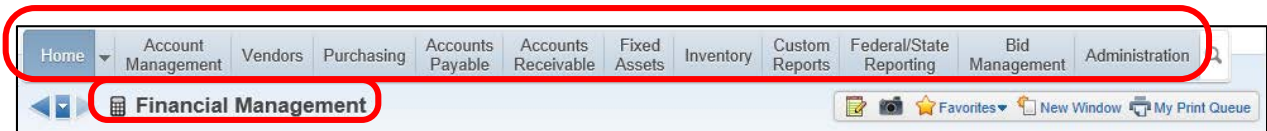



Figure 13 - Tabs that appear when you select the Financial Management product line

Example:

You want to view the Operating Statement Accounts area of the Account Master. You do the following:

1. Click the arrow to the right of the Home tab. 
2. Click Financial Management. The Financial Management tabs appear.
3. Click the Account Management tab (Figure 14). The Account Management modules appear.
4. Locate the Account Master area on the screen and click Operating Statement Accounts.

Note Your security level may not give you to access the areas shown in this example. The example is intended to show you how to select an area within a module.

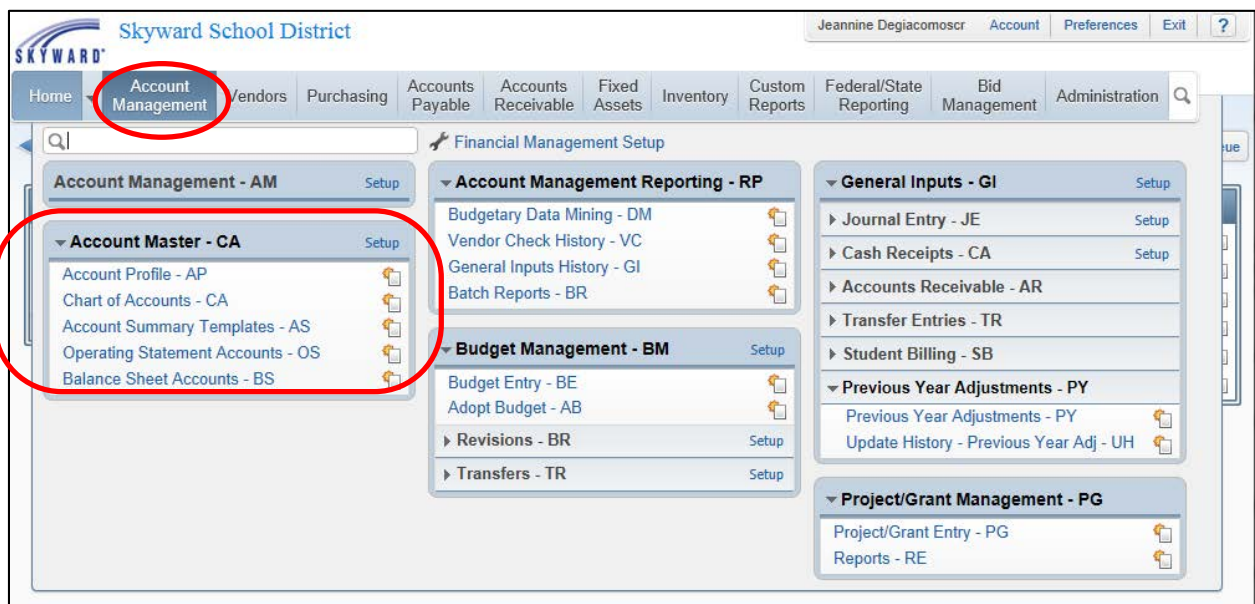


Figure 14 - The Account Management tab contains six modules: Account Management, Account Master, Account Management Reporting, Budget Management, General Inputs, and Project/Grant Management. The Account Master module contains the Operating Statement Accounts area.

Accessing Setup Options

After you select a product line, you can access the Codes, Configuration, and Utilities areas through the Setup link (Figure 15). Your security level determines which areas are available to you.

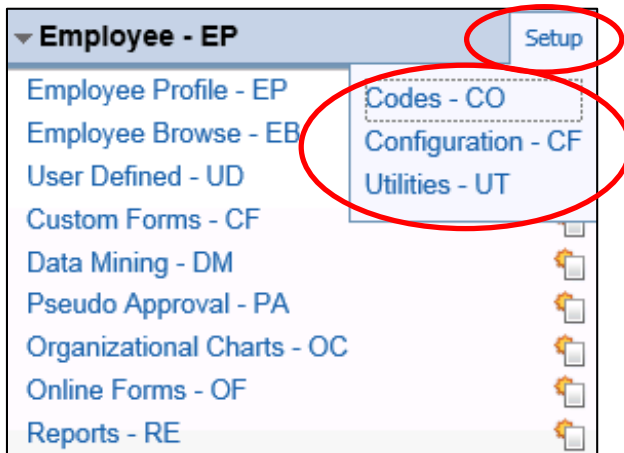



Figure 15 - Example of how to access the Human Resources Employee Setup areas

Example:


You want to configure the Ancestry Codes in the Employee module. You do the following:

1. Click the arrow to the right of the Home tab. 
2. Click Human Resources. The Human Resources tabs appear.
3. Click the Employee tab. The Employee modules appear.
4. Locate the Employee area on the screen and click Setup next to the Employee area heading.
5. Click Codes. The Codes screen appears.
6. Click Ancestry Codes.

Using the Program Locator

You can use the Program Locator to quickly locate an area within a module, or to locate an area anywhere within the product line you are currently in.

To use the Program Locator:

1. Do one of the following:
 - To find an area within the product line you are currently in, click the Search  button to the right to the module tabs (Figure 16).
 - To find an area within a module, click a module name such as Students (Figure 17).
2. Click inside the Program Locator box and type the name of the area. As you type, all matching areas (which you have the security level to access) appear.
3. Click an area to navigate to that area.

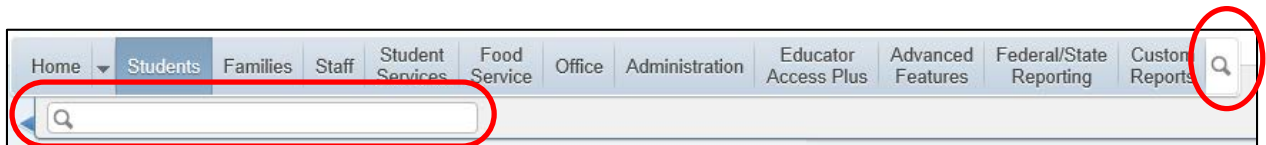


Figure 16 - When you click the Search button, the Program Locator appears

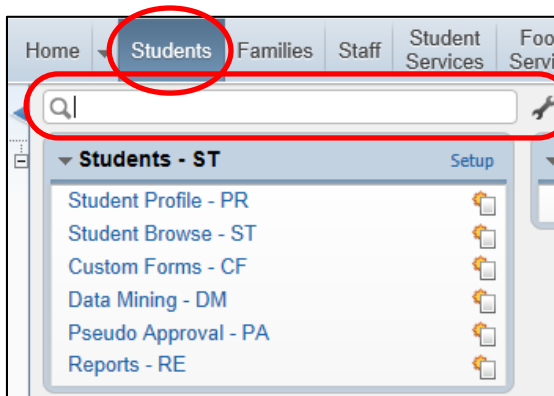




Figure 17 - When you click the Students tab, the Program Locator appears

Accessing Recently Used Modules

There are three ways to access recently used modules. Each way allows you to access other modules more quickly than using the navigation path.

To access recently used modules:

- Do one of the following:
 - From any screen, click the forward or back arrow  under the Home tab to move forward or backward through your recently accessed modules (Figure 18).
 - From any screen, click the center arrow  under the Home tab to display the list of recently accessed modules and click a module name.
 - If you are on the Home screen, click a module name in the Recent Programs widget.

Note If you don't see the Recent Programs widget, see "[Adding Widgets](#)" (page 13) to learn how to add the widget.

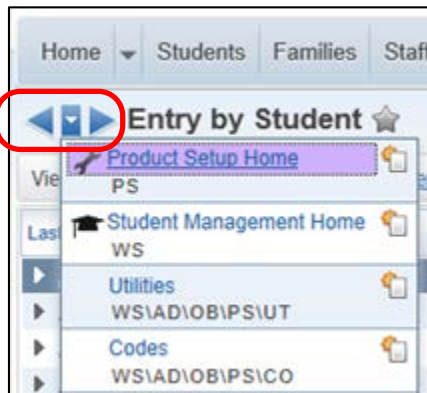



Figure 18 - When you click the center arrow, a list of the modules you viewed most recently appears.

Selecting an Entity in Student Management

When you access the Student Management product line, the majority of the work you do is done at an Entity level (for example, at a high school). Therefore, you must verify that you are in the correct Entity.

To select an Entity in Student Management:

- Click the arrow to the right of the Entity box  in the upper-left corner and select the Entity (Figure 19).

You can use this Entity box to switch from one Entity to another. Your security level determines which Entities appear in the menu. If you have access to only one Entity, that Entity appears in place of the Entity box.

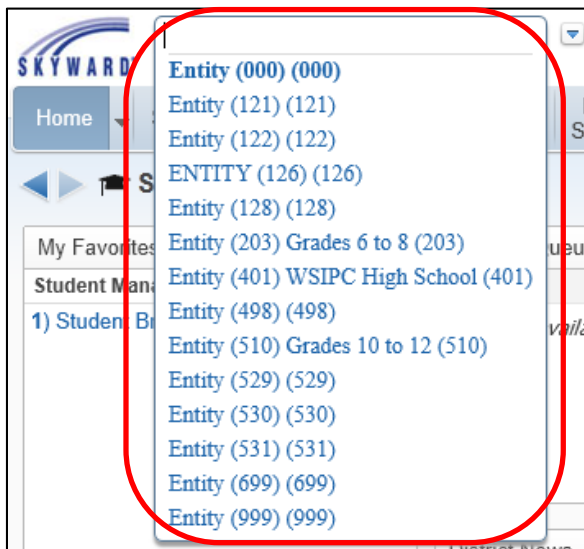


Figure 19 - Entity selection box, expanded to show all available Entities

Understanding Common Buttons

Several buttons are common in Skyward's School Management System (Figure 20). These buttons function as their names suggest. For example, the Add button allows you to add data. If you are in a Codes area, you'll click Add to add a code. Table 3 defines common buttons in Skyward's School Management System.

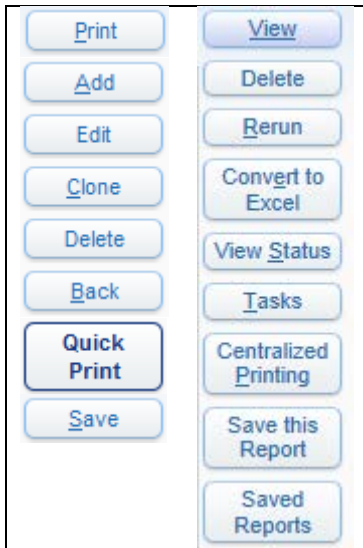


Figure 20 - Common buttons that appear throughout Skyward's School Management System

Button	Action
Print	Sends the report to the Print Queue. To learn about the Print Queue, see " My Print Queue " (page 66).
Add	Opens a screen that allows you to add information.
Edit	Opens screen where you can make changes and updates.
Clone	Opens a copy of a selected template screen. The ranges and options are pre-populated with parameters of the selected template. The template may remain an exact copy or you can change it to use different parameters.
Delete	Deletes the item you select.
Back	Takes you to the previous page or screen.

Button	Action
Quick Print	Sends a report directly to the Print Queue without opening the report template screen. In some cases, you can make some parameter selections before the report is printed. You can access report templates from Quick Print to change your template settings. See " Running Reports " (page 78) to learn more about report templates.
Save	Saves your changes.
View Rerun Convert to Excel View Status Tasks Centralized Printing Save This Report Saved Reports	See " My Print Queue " (page 66) to learn about these buttons.

Table 3 - Description of common buttons in Skyward's School Management System

Using Browse Screens

Browse screens are common in Financial Management, Human Resources, and Student Management. Browse screens contain a list of records. Figure 21 shows an example of a Browse screen.

Last Name	First	Middle	S	Gr	GY	DE	Age	G	GLO	Adv	Ret	NY Grad Yr	Gr Req Bs Yr	Grad	Grad Date
Aberlescr	Jaimie	K	I	13	2002	401	27	M	13	N	N	2002	2002	N	
Acedoscr	Katheryn	N	I	GD	2009	401	21	F		N	N	2009	2009	N	
Acetoscr	Alex	K	I	GD	2009	401	20	M		N	N	2009	2009	N	
Acetoscr	Jasper	I	I	11	2013	201	16	M		N	N	2013	2013	N	
Aceyscr	Palmer	K	I	GD	2007	401	22	M		N	N	2007	2007	Y	06/08/2007
Ackerleyscr	Emory	N	A	09	2015	401	15	M		N	N	2015	2015	N	
Acrescr	Catrina	N	I	GD	2007	401	23	F		N	N	2007	2007	Y	06/08/2007
Acrescr	Ronald	M	I	GD	2005	401	24	F		N	N	2005	2005	Y	06/11/2005
Acyscr	Arnold	T	I	GD	2006	401	24	M		N	N	2006	2006	N	
Acyscr	Taryn	R	I	GD	2007	401	23	F		N	N	2007	2007	N	
Adayscr	Cameron	S	I	GD	2006	401	24	M		N	N	2006	2006	Y	06/04/2006
Admirescr	Kenny	V	I	GD	2009	401	20	M		N	N	2009	2009	N	

Figure 21 - Browse screen in the Student Demographics area of Student Management

Note Every Browse screen contains Views and Filters features. Filters let you choose which records appear on the Browse screen for viewing and editing. Views change the type of information you see in the columns. To learn more about Views and Filters, see [“Using Browse Views and Filters”](#) (page 42).

Understanding the Browse Screen Display

Records appear in a table on a Browse screen (Figure 22). Each row in the table is a record. Each column contains a piece of information about the record. Browse screens may also contain buttons that you can use to modify a record or add a new record.

The screenshot shows a web browser window titled "Student Browse". The main content is a table with columns for student information and attendance. A sidebar on the right contains various action buttons. Annotations with green boxes and arrows identify key elements:

- Record:** Points to the row for student Alex Acetoscr.
- Column Headings:** Points to the header row of the table.
- Buttons:** Points to the sidebar containing buttons like Add, Edit, Delete, Transfer, Pseudo Edit, Add Attendance, Letters, Totals, ATN Notes (0), All Notes (1), and Susp/Exp.

Last Name	First	Middle	S	Gr	GY	DE	Age	G	#	(1) Ent	(1) Yr	(1) Attn Date	(1) Day	(1) P-N	(1) 01	(1) 02
▶ Aberlescr	Jaime	K	I	13	2002	401	27	M						N		
▶ Acedoscr	Katheryn	N	I	GD	2009	401	21	F	1	401	2007	09/05/2006	Tue	N		
▶ Acetoscr	Alex	K	I	GD	2009	401	20	M	1	401	2007	06/13/2007	Wed	N		L-
▶ Acetoscr	Jasper	I	I	11	2013	201	16	M						N		
▶ Aceyscr	Palmer	K	I	GD	2007	401	22	M	1	401	2007	05/21/2007	Mon	Y	U-NN	U-N
▶ Ackerleyscr	Emory	N	A	09	2015	401	15	M	1	401	2012	05/24/2012	Thu	Y		E-DI
▶ Acrescr	Catrina	N	I	GD	2007	401	23	F	1	401	2007	06/06/2007	Wed	N		
▶ Acrescr	Ronald	M	I	GD	2005	401	24	F	1	401	2005	06/08/2005	Wed	N		
▶ Acyscr	Arnold	T	I	GD	2006	401	24	M						N		
▶ Acyscr	Taryn	R	I	GD	2007	401	23	F						N		

Figure 22 - Example of records, column headings, and buttons on a Browse screen

Changing How Many Records Appear on a Browse Screen

You can easily change how many records appear on a Browse screen. The screen can show between 10 and 2000 records.

To change how many records appear on a Browse screen:

- In the lower-left corner of the screen, select a number in the Records Displayed box (Figure 23).



Caution

The screen loads more slowly if you choose to display many records. To correct this, select a lower number of records.

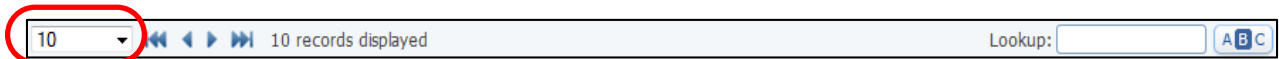


Figure 23 - The Records Displayed box at the bottom of each Browse screen, shows the number of records currently displayed on that Browse screen

Locating a Record on the Browse Screen

Three tools that help you locate a record, appear at the bottom of every Browse screen (Figure 24). The following sections describe these tools.



Figure 24 - The bottom of a Browse screen always contains navigation arrows on the left and a Lookup box on the right

Note

The filter that is active for the Browse screen always defines the records that appear on that Browse screen. If you can't find a record in the Browse screen, verify that the record you're searching for is within your filter's parameters. To learn more about filters, see "[Using Browse Views and Filters](#)" (page 42).

Using Lookup Boxes

You can use the Lookup box to quickly locate a record. For example, to locate records for students with the last name of Smith, type “Smith” in the Lookup box and press Enter on your keyboard. The Browse screen refreshes with records of students with the last name of Smith. If no students have the last name of Smith, the screen refreshes with the first record that is alphabetically closest to the name Smith. If it is possible to search on more than one field, the fields that you can search on appear when you pause your mouse pointer over the Lookup box.

Figure 25 shows an example of a Lookup box. The tool tip shows the various criteria that you can use in this Lookup box to search for a student. The tool tip appears when you pause your mouse pointer over the Lookup box.

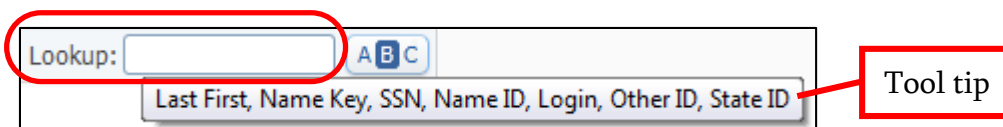


Figure 25 - A Lookup box in Student Management

Using Lookup by Letter

You can use the Lookup by Letter function to jump to the set of records that begin with that number or letter. For example, if you click the letter M, the Browse screen refreshes with records that start with the letter M.

To use Lookup by Letter:


1. Click the Lookup by Letter button  in the lower-right corner of the screen (Figure 26). A row of number and letter buttons appears in place of the arrows. (Figure 27).
2. Click a number or letter to show records beginning with that character on the screen.



Figure 26 - Lookup by Letter button

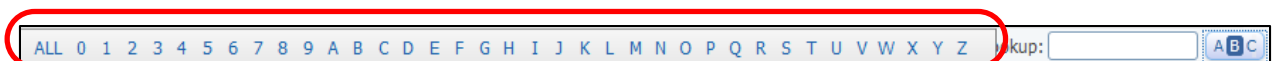


Figure 27 - A row of number and letter buttons appears when you click the Lookup by Letter button

Using Navigation Arrows

Navigation arrows help you move through records quickly (Figure 28). Table 4 explains the purpose of each navigation arrow.



Figure 28 - Navigation arrows on a Browse screen





Arrow	Purpose
	Moves to the first page of records.
	Moves to the previous page of records.
	Moves to the next page of records.
	Moves to the last page of records.

Table 4 - Purpose of navigation arrows

Viewing a Record's Details

Most records have more information than you see when the screen opens. The following sections show you how to view additional information for a record.

Selecting a Record

Once you locate a record, you must select it before you can modify or view details for that record.

To select a record:


- Pause your mouse pointer over the record and click the record.

A dark blue background appears behind the selected record.

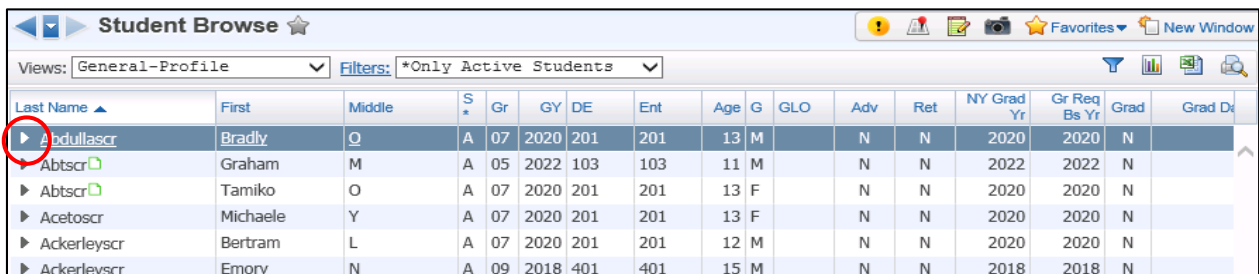
Expanding a Record

Once you select a record, expand the record to show the areas related to that record.

To expand a record:

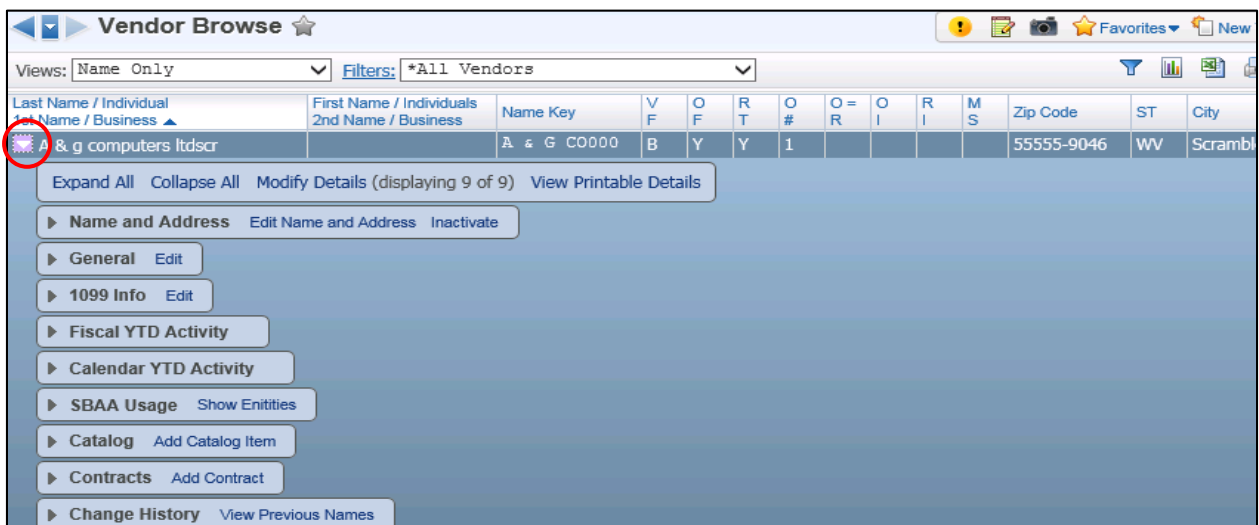
- Click the arrow  to the left of the record (Figure 29).

A list of headings appears. In Figure 30, a record has been expanded and a list of headings appears beneath the expanded record.



Last Name	First	Middle	S	Gr	GY	DE	Ent	Age	G	GLO	Adv	Ret	NY Grad Yr	Gr Req Bs Yr	Grad	Grad Dt
Abdullascr	Bradly	O	A	07	2020	201	201	13	M		N	N	2020	2020	N	
Abtscr	Graham	M	A	05	2022	103	103	11	M		N	N	2022	2022	N	
Abtscr	Tamiko	O	A	07	2020	201	201	13	F		N	N	2020	2020	N	
Acetoscr	Michaele	Y	A	07	2020	201	201	13	F		N	N	2020	2020	N	
Ackerleyscr	Bertram	L	A	07	2020	201	201	12	M		N	N	2020	2020	N	
Ackerleyscr	Emory	N	A	09	2018	401	401	15	M		N	N	2018	2018	N	

Figure 29 - A Student Management Browse screen showing a collapsed record. Clicking the arrow expands the record.



Last Name / Individual Name / Business	First Name / Individuals 2nd Name / Business	Name Key	V	O	R	O	O	O	R	M	Zip Code	ST	City
A & g computers ltdscr		A & G C0000	B	Y	Y	1					55555-9046	WV	Scrambl

Expand All Collapse All Modify Details (displaying 9 of 9) View Printable Details

- ▶ Name and Address Edit Name and Address Inactivate
- ▶ General Edit
- ▶ 1099 Info Edit
- ▶ Fiscal YTD Activity
- ▶ Calendar YTD Activity
- ▶ SBAA Usage Show Entities
- ▶ Catalog Add Catalog Item
- ▶ Contracts Add Contract
- ▶ Change History View Previous Names

Figure 30 - A Financial Management Browse screen. A list of headings appears when you expand the record.

Accessing Browse Details

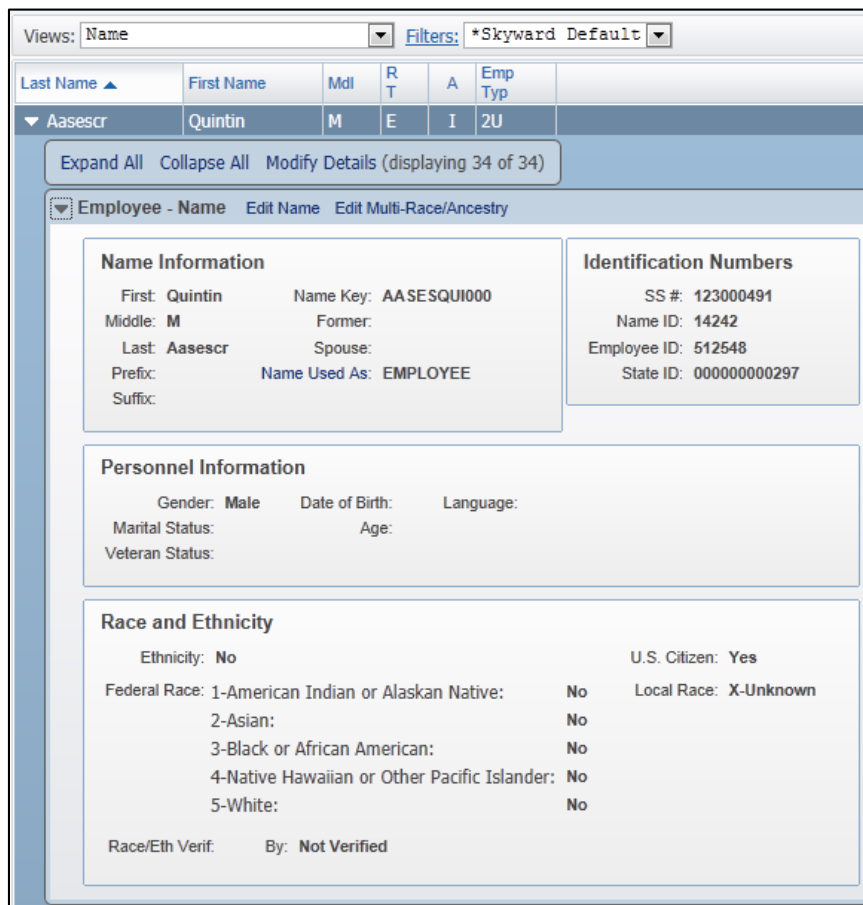
Once you expand the record and can see all the headings, you can expand each heading and view details about the record. These details are called *browse details*.

Tip See “[Understanding Pop-up Browse Details](#)” (page 92), to learn how to turn on the option to show a record’s browse details when you pause your mouse pointer over one of the record’s headings.

To access browse details:

- Click the arrow  next to the record.

In Figure 31, the Employee - Name heading is expanded. The information on the screen is the detail for the selected Employee Record.



Views: Name Filters: *Skyward Default

Last Name ▲	First Name	Mdl	R T	A	Emp Typ
▼ Aasescr	Quintin	M	E	I	2U

Expand All Collapse All Modify Details (displaying 34 of 34)

Employee - Name Edit Name Edit Multi-Race/Ancestry

Name Information

First: Quintin Name Key: AAESQI000
 Middle: M Former:
 Last: Aasescr Spouse:
 Prefix: Name Used As: EMPLOYEE
 Suffix:

Identification Numbers

SS #: 123000491
 Name ID: 14242
 Employee ID: 512548
 State ID: 00000000297

Personnel Information

Gender: Male Date of Birth: Language:
 Marital Status: Age:
 Veteran Status:

Race and Ethnicity

Ethnicity: No U.S. Citizen: Yes
 Federal Race: 1-American Indian or Alaskan Native: No Local Race: X-Unknown
 2-Asian: No
 3-Black or African American: No
 4-Native Hawaiian or Other Pacific Islander: No
 5-White: No
 Race/Eth Verif. By: Not Verified

Figure 31 - Browse details under the Employee-Name heading for an Employee Record

Using View Options

When you expand a record, four hyperlinks appear above the headings (Figure 32). Each hyperlink allows you to define how the records' details appear on the screen. Table 5 explains each hyperlink.

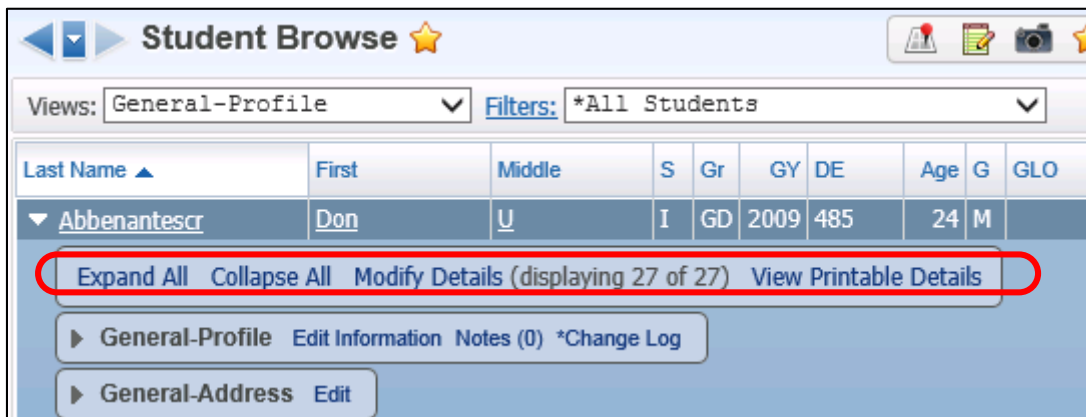


Figure 32 - View option hyperlinks for browse details

Hyperlink	Purpose
Expand All / Collapse All	Opens and closes browse details for each heading of the selected record.
Modify Details	Opens a screen that lists all possible areas for the record. This screen allows you to display, hide or change the order of the headings for all the records in the Browse screen. Altering the heading view also changes which browse details you see on your Browse screen.
View Printable Details	Opens the Browse screen in a printer-friendly format. To print the browse, click Print This Page.

Table 5 - Description of view option hyperlinks

Editing a Record on the Browse Screen

You can edit records directly from a Browse screen if your security level allows it. There are two ways to edit a record.

If an Edit button appears on the right side of the screen (Figure 33), you can click it to modify details about the record.

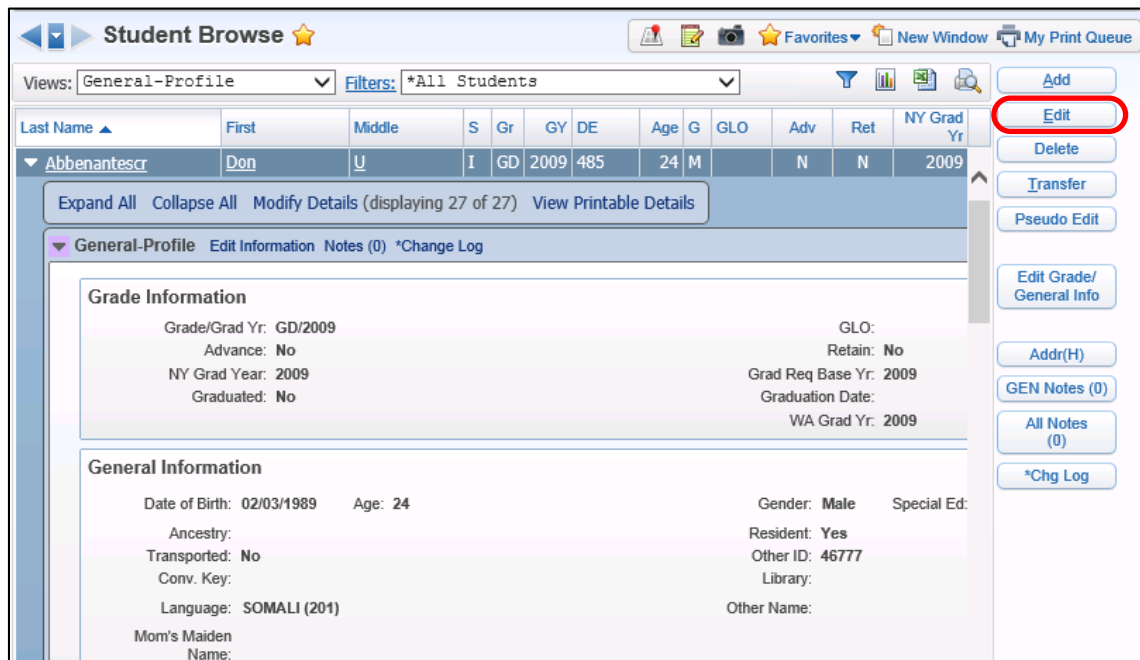



Figure 33 - If an Edit button appears, you can use it to modify details about the record

You can also click the Edit Information or Edit hyperlink next to a heading to edit the record's browse details (Figure 34). For example, if you click the Edit Information hyperlink next to the General-Profile heading, an Edit screen appears. In some cases, you may need to click the arrow  next to a heading before you see the Edit Information or the Edit hyperlink.

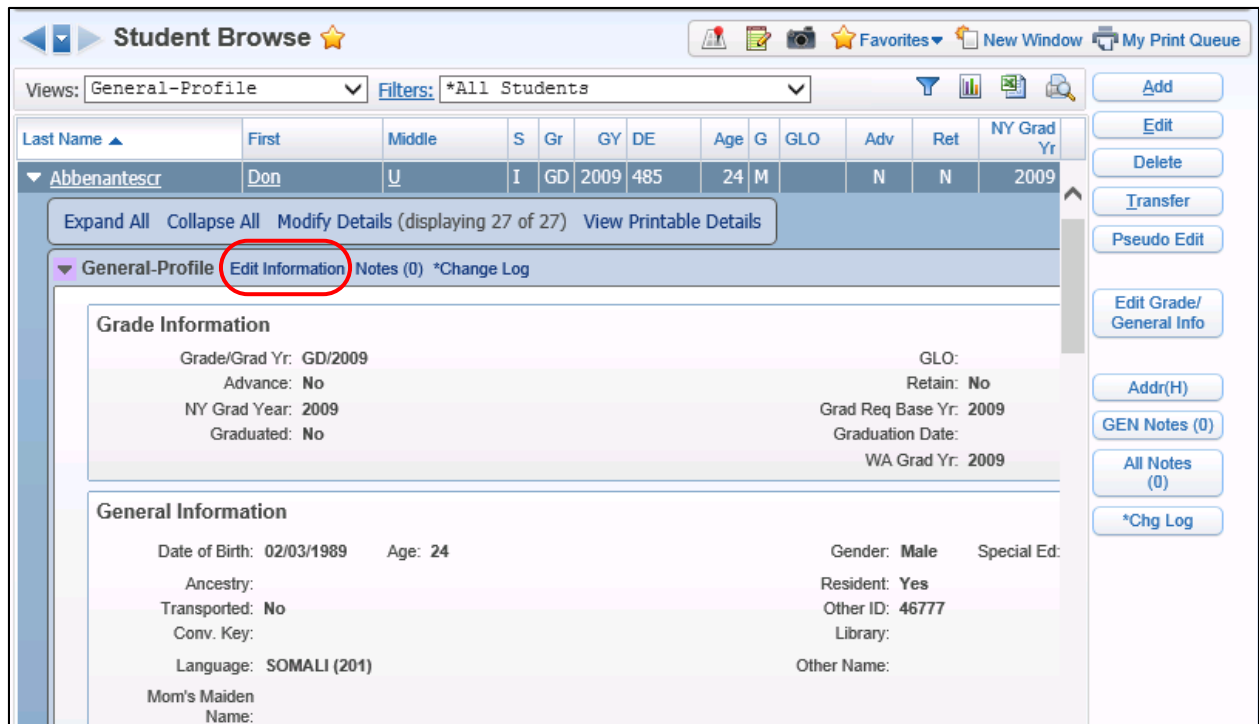


Figure 34 - An Edit Information hyperlink for the General-Profile heading on the Student Browse screen

Sorting Records on a Browse Screen Using Column Headings

You can use any column heading on your Browse screen to sort records.

Note You can use column headings to sort records only if you haven't created a custom sort in the filter that is currently in use. To learn about filters, see ["Using Browse Views and Filters"](#) (page 42).

To sort records on a Browse screen using column headings:

- Click the heading of the column you want to sort the records by.

The records automatically sort according to the heading you selected. You can sort records in descending or ascending order.

When you use a column heading to sort, an up or down arrow (caret) appears next to the heading. The up arrow means the records on the page are sorted in ascending order and the down arrow means the records are sorted in descending order. In Figure 35, the records on the Browse screen are sorted by the Account Number column in ascending order.

To change the direction of sorted records:

- Click the caret next to the column heading that the records are sorted on (Figure 35).

To undo a column sort:

- Click the Return to default sort arrow  in the upper-right corner of the Browse screen (Figure 35).

Note The Return to default arrow appears only when a column is being used to sort.

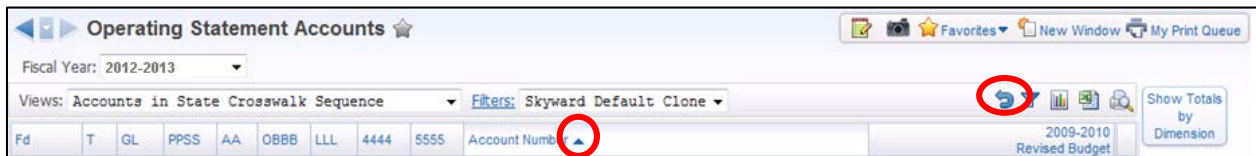


Figure 35 - The caret to the right of the Account Number column indicates that the Account Number column is being used to sort the records. The Return to default sort arrow appears in the upper-right corner.

Working with Browse Screen Information

You can display the summary information in a Browse screen in three different formats: a chart, a spreadsheet, and a printer-friendly version. This section shows you how to use each format.

The buttons for performing these formats are located in the upper-right corner of the Browse (Figure 36).

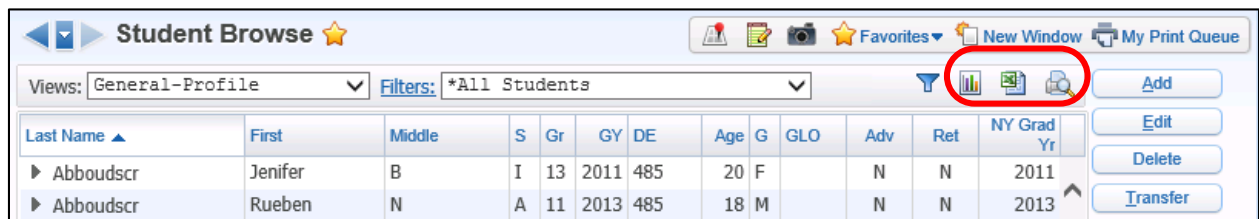


Figure 36 - Chart, spreadsheet and printer-friendly formats

Creating a Chart

The Chart Options button displays Browse screen data in the form of a chart. You can choose from chart types such as a pie chart or a bar chart.

To create a chart:

1. Navigate to the Browse screen you want to create a chart for.
2. Configure the filter options to refine the records to appear in the chart. To learn more about filters, see "[Configuring a Filter](#)" (page 43).

3. Click Chart Options. 

4. Click Add Chart.

Note You can also display, edit, clone, or delete any chart you've created.

5. Configure the Create Chart screen. A preview of the chart appears in the Preview area as you configure this screen (Figure 37).

6. Click Save And Display Chart.
7. Do any of the following:
 - a. Click Print Chart or Save Chart.
 - b. To export the chart to Microsoft Excel, do the following:
 - i. Select Export to Excel (Figure 38).
 - ii. Click the data point on the chart that you want to export to Excel.
 - c. To drill down to view details of the chart, do the following:
 - i. Select Drill-down (Figure 38).
 - ii. Click the data point on the chart that you want to view in more detail.

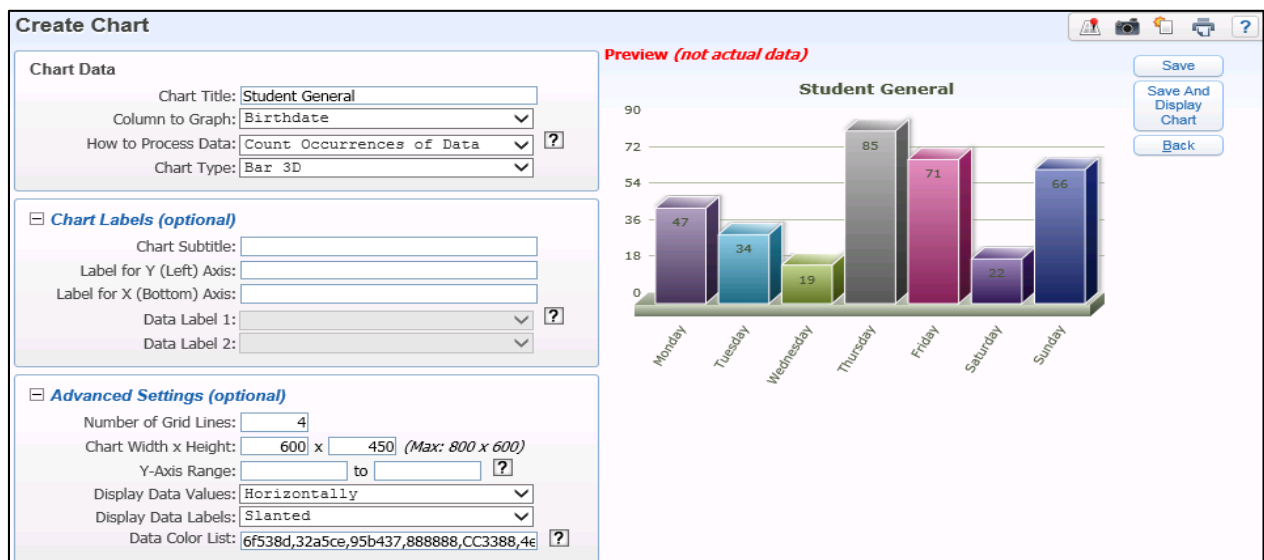


Figure 37 - The Create Chart screen displaying a preview of the chart

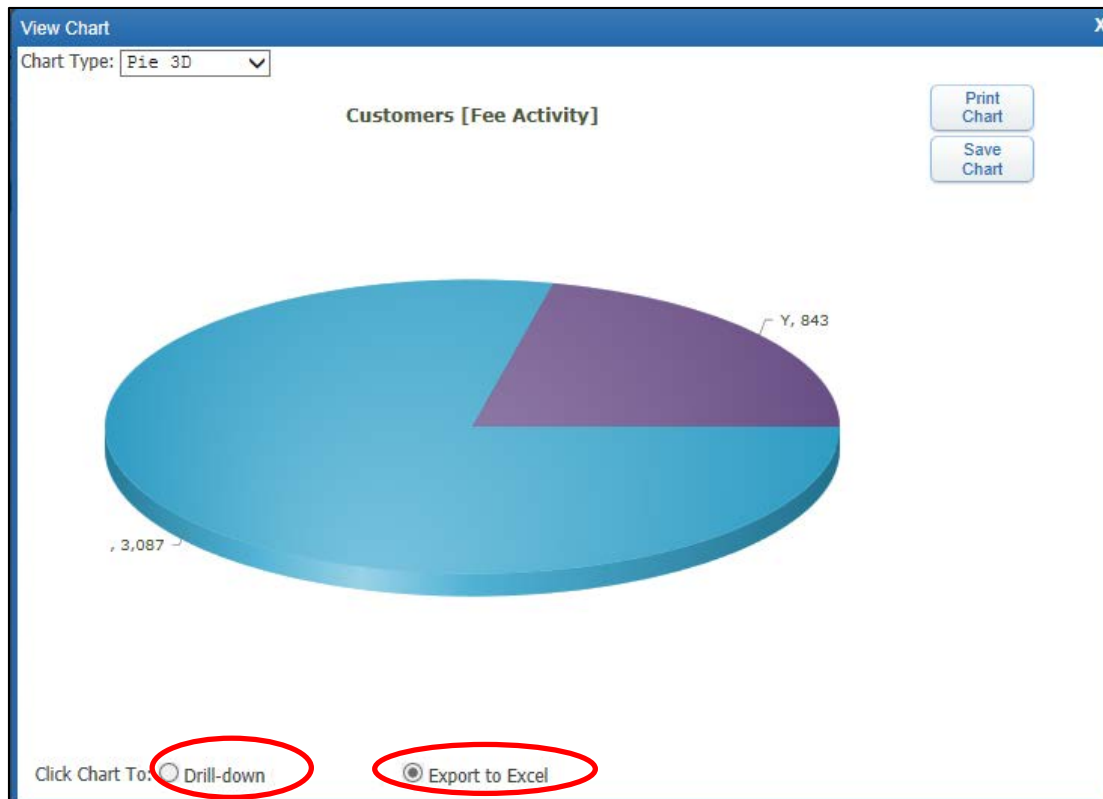



Figure 38 - Chart showing Drill-down and Export to Excel options

Exporting Data to a Spreadsheet

The Export Options button exports the data from records in the Browse screen to a spreadsheet. The default spreadsheet format is defined in the Preferences area of the product. To learn more about Preferences, see [“Setting Your Preferences”](#) (page 87).

To export data to a spreadsheet:

1. Navigate to the Browse screen you want to export data from.
2. Configure the filter options to refine the records to export. To learn about filters, see [“Configuring a Filter”](#) (page 43).
3. Click Export Options. 
4. Select an export option (CSV, Excel, or Open Office).
5. Click Export. Figure 39 shows an example of a Browse screen that has been exported to Excel.


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Last Name	First	Middle	Sr	GY	DE	Age	GLO	Adv	Ret	NY Grad Yr	Gr Req Bs Yr	Grad	Grad Date	WA Gr Yr	Birthdate	Lang	Nat. Lang	Home Lang		
2	Aaronsonscr	Damion	V	A	09	2014	401	15	M	N	N	2014	2014	N		2014	08/29/1995	ENG	ENG	ENG	
3	Abbruzzesescr	Anika	I	I	08	2015	203	13	F	N	N	2015	2015	N		2016	11/14/1997	ENG	ENG	ENG	
4	Abitongscr	Barney	E	I	12	2011	401	19	M	N	N	2011	2011	N		2011	05/20/1992	ENG	ENG	ENG	
5	Abrewscr	Hoyt	X	I	08	2015	203	13	M	N	N	2015	2015	N		2015	09/26/1997	ENG	ENG	ENG	
6	Abrewscr	Landon	J	A	09	2014	401	14	M	N	N	2014	2014	N		2014	08/30/1996	ENG	ENG	ENG	
7	Acheescr	Shavonne	T	A	10	2013	401	15	F	N	N	2013	2013	N		2013	09/28/1995	ENG	ENG	ENG	
8	Adamiscr	Ginger	L	I	08	2015	203	14	F	N	N	2015	2015	N		2015	11/28/1996	ENG	ENG	ENG	
9	Adelsteinscr	Corrina	A	I	D	2007	401	21	F	N	N	2007	2007	N		2007	10/15/1989	ENG	ENG	ENG	

Figure 39 - Excel Spreadsheet view of the records exported from a Browse screen

Creating a Printer-Friendly Version of Browse Data

The Create printer friendly display of this browse button displays the records on the current Browse screen in a printer-friendly format.

To create a printer-friendly version of browse data:

1. Navigate to the Browse screen you want to view in a printer-friendly format.
2. Configure the filter options to refine the records to export to a printer-friendly format. To learn about filters, see [“Configuring a Filter”](#) (page 43).
3. Click Create printer friendly display of this browse . The data is exported to the Print Browse Data screen (Figure 40).

Note Records that were expanded on the Browse screen are automatically collapsed on the Print Browse Data screen (Figure 40).

4. Click Hide under a column heading to remove the column from the printed view.
5. Click Print This Screen at the top of the screen to print the browse data.

Using Browse Screens

Print Browse Data

Print This Screen

Page Title: Student General-Profile Information

Last Name	First	Middle	S	Gr	GY	DE	Age	G	GLO	Adv	Ret	NY Grad Yr	Gr Req	Bs Yr	Grad	Grad Date	WA Gr Yr	Birthdate	Lang	Nat. Lang	Home Lang	Li
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acheescr	Shavonne	T	A	10	2013	401	16	F	N	N		2013	2013	N			2013	09/28/1995	ENG	ENG	ENG	
Anconascr	Ashlyn	J	A	10	2013	401	16	F	N	N		2013	2013	N			2013	10/30/1995	ENG	ENG	ENG	
Annettscr	Divina	J	A	10	2013	401	16	F	N	N		2013	2013	Y	06/09/2013		2013	05/13/1995	ENG	ENG	ENG	
Antosscr	Mikki	D	A	10	2013	401	16	F	N	N		2013	2013	N			2013	05/26/1995	ENG	ENG	ENG	
Aquilinoscr	Soraya	G	A	10	2013	401	16	F	N	N		2013	2013	N			2013	07/28/1995	ENG	ENG	ENG	
Atlanoscr	Doria	D	A	10	2013	401	16	F	N	N		2013	2013	N			2013	03/13/1995	ENG	ENG	ENG	
Bartonescr	Melita	W	A	10	2013	401	16	F	N	N		2013	2013	N			2013	10/01/1995	ENG	ENG	ENG	
Buckbeescr	Ena	P	A	10	2013	401	16	F	N	N		2013	2013	N			2013	08/26/1995	ENG	ENG	ENG	
Bundescr	Agnes	Z	I	10	2013	401	16	F	N	N		2013	2013	N			2013	02/20/1995	ENG	ENG	ENG	
Casebeescr	Tynisha	E	A	10	2013	401	16	F	N	N		2013	2013	N			2013	04/19/1995	ENG	ENG	ENG	
Cesascr	Demetria	F	A	10	2013	401	16	F	N	N		2013	2013	N			2013	06/06/1995	ENG	ENG	ENG	
Chauzescr	Celena	K	A	10	2013	401	17	F	N	N		2013	2013	N			2013	11/06/1994	ENG	ENG	ENG	
Colesonscr	Veronica	M	A	10	2013	401	16	F	N	N		2013	2013	N			2013	01/09/1995	ENG	ENG	ENG	
Conryscr	Steven	O	A	10	2013	401	16	F	N	N		2013	2013	N			2013	10/05/1995	ENG	ENG	ENG	
Corriescr	Stephen	D	A	10	2013	401	16	F	N	N		2013	2013	N			2013	10/03/1995	ENG	ENG	ENG	
Creeganscr	Latrina	J	A	10	2013	401	16	F	N	N		2013	2013	N			2013	04/09/1995	ENG	ENG	ENG	
Creganscr	Eulah	S	A	10	2013	401	16	F	N	N		2013	2013	N			2013	09/09/1995	ENG	ENG	ENG	
Cruzescr	Jimmy	J	A	10	2013	401	16	F	N	N		2013	2013	N			2013	06/20/1995	ENG	ENG	ENG	
Dahmerscr	Lanita	E	A	10	2013	401	17	F	N	N		2013	2013	N			2013	11/12/1994	ENG	ENG	ENG	
Danielsenscr	Jacelyn	R	A	10	2013	401	16	F	N	N		2013	2013	N			2013	01/16/1995	ENG	ENG	ENG	
Delgrossoscr	Aja	T	A	10	2013	401	16	F	N	N		2013	2013	N			2013	02/02/1995	ENG	ENG	ENG	
Delosrioscr	Dione	K	A	10	2013	401	16	F	N	N		2013	2013	N			2013	04/11/1995	ENG	ENG	ENG	
Dennehyscr	Dierdre	B	A	10	2013	401	16	F	N	N		2013	2013	N			2013	12/22/1994	ENG	ENG	ENG	
Devensscr	Donnette	P	I	10	2013	401	16	F	N	N		2013	2013	Y	06/09/2013		2013	10/25/1995	ENG	ENG	ENG	
Donadioscr	Sherrell	J	I	10	2013	401	16	F	N	N		2013	2013	N			2013	03/10/1995	ENG	ENG	ENG	
Duchonscr	Maxima	T	I	10	2013	529	16	F	N	N		2013	2013	N			2013	06/14/1995	ENG	ENG	ENG	
Emmascr	Katelin	T	A	10	2013	401	16	F	N	N		2013	2013	N			2013	07/17/1995	ENG	ENG	ENG	
Esperanzascr	Avelina	R	A	10	2013	401	16	F	N	N		2013	2013	N			2013	06/17/1995	ENG	ENG	ENG	
Evensenscr	Sommer	F	A	10	2013	401	16	F	N	N		2013	2013	N			2013	01/22/1995	ENG	ENG	ENG	
Fahsscr	Deandrea	P	I	10	2013	401	16	F	N	N		2013	2013	N			2013	04/03/1995	ENG	ENG	ENG	
Farlesscr	Min	Z	A	10	2013	401	16	F	N	N		2013	2013	N			2013	05/18/1995	ENG	ENG	ENG	

Figure 40 - Printer-friendly display of the Browse screen data

Using Browse Views and Filters

Views and filters work together to determine what information you see on the Browse screen. Views determines the type of information that can be filtered. Filters determine the following:

- Which records appear on the Browse screen
- Which data elements (columns) appear for those records
- The order in which the data elements (columns) appear
- The sort order of the records in the table

For example, you can select the General-Profile view and then configure a filter to display only students who have a Student Access username that begins with the letter A.

Tip

Sometimes, customized browse settings and browse filters can cause your browser to load slowly. For example, a browse filter may take a long time to load if you have selected more than 500 records to display.

To remedy this, you can delete browse settings (to learn how to do this, see “[Changing How Many Records Appear on a Browse Screen](#)” on page 28), and you can delete individual browse filters or all browse filters (to learn how to do this “[Managing Slow-Loading Browse Filters](#)” on page 53).

Selecting a View

Selecting a view allows you to control the information and options that are available for selection when you configure a filter. In addition, a view controls what type of data you see on the Browse screen.

To select a view:

- Click the arrow to the right of the Views box and select a view from the list (Figure 41).

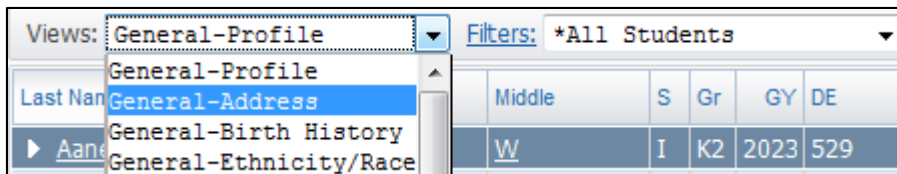


Figure 41 - Selecting a view from the Views list

Note Each Browse screen provides different view options. You cannot add additional view options or modify existing options.

Configuring a Filter

Once you select a view, you can configure a filter to specify which records appear on the screen. There are two types of filters: pre-defined filters and custom filters.

Using a Pre-defined Filter

Every screen offers pre-defined filters. A pre-defined filter has an asterisk in its title (Figure 42).

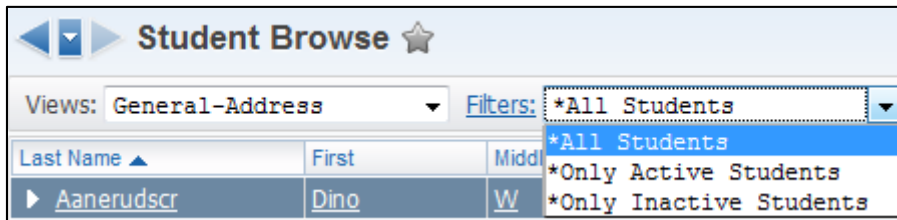


Figure 42 - Pre-defined filters appear with an asterisk before their title

To use a pre-defined filter:

1. Click the arrow to the right of the Filters box.
2. Click the name of the pre-defined filter. The filter is applied to the records in the view.

Creating a Custom Filter

You can use any of the pre-defined filters to create a custom filter or you can create one from scratch.

To create a custom filter:

1. Go to a Browse screen (for example, Student Management\Families\FA\FA).

Note To learn how to follow this path, see “[Using Paths in WSIPC Product Guides](#)” (page 102).

2. Select a view from the Views menu.
3. Click Filters.
4. Click Add Filter.
5. Configure the Modify Filter screen (Figure 43). Table 6 describes the options on this screen.
6. Click Save and Apply Filter.

Note The view you select determines the fields in the Labels column that are available on the Modify Filter screen.

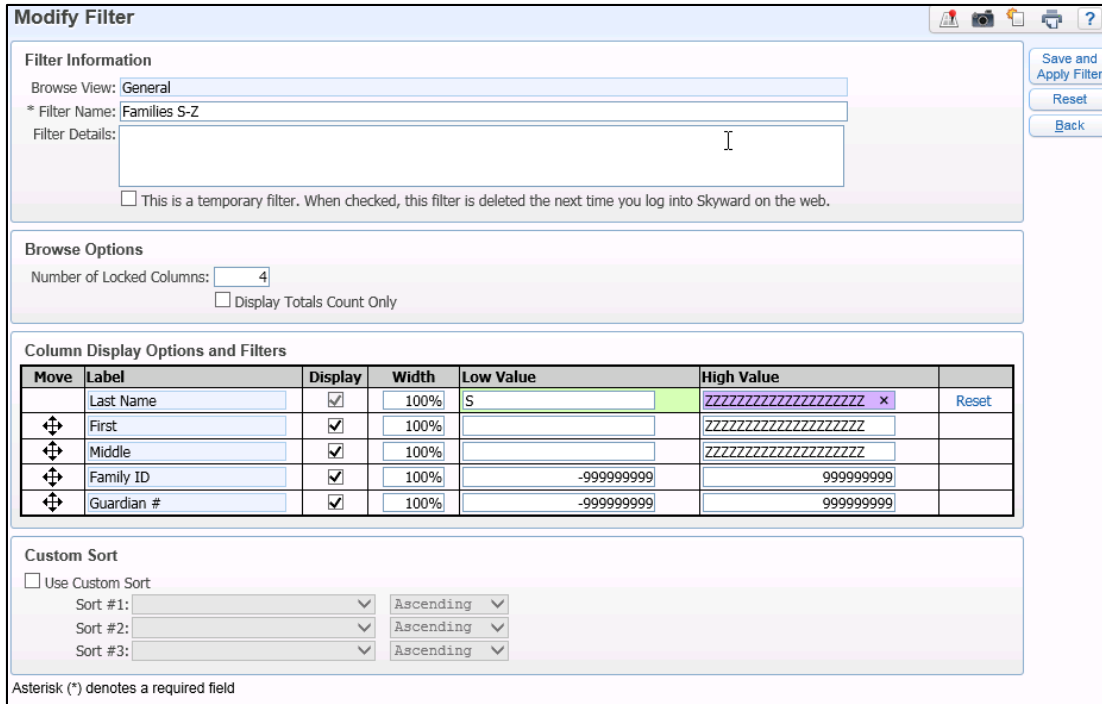


Figure 43 - Example of how to configure the Modify Filter screen

The filter you created is linked to the view you selected when you created the filter. This new filter appears only in the list of filters for that view (Figure 44).

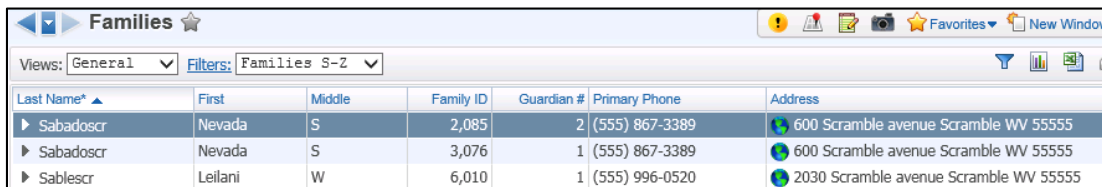


Figure 44 - The filter called “Families S-Z” only appears in the General View browse

Option	Description
Browse View	Browse View to which this filter is assigned.
Filter Name	Unique name for the filter. Enter something that briefly describes the parameters of the filter, such as “Active Seniors A – M.”
Filter Details	Additional information to help you identify the parameters of this filter, such as “All active Seniors with a last name starting with A through M.”


Option	Description
This is a temporary filter...	Deletes the filter when you sign out of Skyward's School Management System.
Number of Locked Columns	Number of columns that remain locked when scrolling from left to right on the Browse screen.
Display Totals Count Only	Prevents any records from appearing on the Browse screen and instead displays a single line with the count of the number of records that would be included in the filter.
Move	Repositions data on the Browse screen. Click and hold the arrow button  next to the Label heading you want to move, and drag the item to a new position.
Label	Name of the Column.
Display	Displays the data element on the Browse screen. Clear the Display check box to hide the data element on the Browse screen.
Width	Expands or contracts the column width of any data element.
Low and High Value	Determines which records appear on the Browse screen.
Custom Sort	A custom sub-sort order for the records as they appear on the page of the Browse screen. See " Using a Custom Sort " below to learn more about this option.

Table 6 - Description of the options on the Modify Filter screen

You navigate to the next page. On this page the next set of 10 records, according to the Last Name alphabet span of “A” to “CZZZZ,” are once again sorted by the students’ First Names (Figure 48).

Last Name*	First 1	Middle	S	Gr	GY	DE	Age	G	# (1) Family	(1) Title	(1) Fam Id
▶ Ahbergscr	Adolfo	A	I	GD	2010	401	18	M	Ahbergscr Porsche D		3787
▶ Agudeloscscr	Dwight	Z	I	GD	2006	401	24	M	Agudeloscscr Rosela R		516
▶ Aguassscr	Errol	X	I	13	2005	401	24	M	Aguassscr Kala Y		821
▶ Aguassscr	Foster	A	I	GD	2008	401	21	M	Aguassscr Kala Y		821
▶ Anslescscr	Livia	V	A	11	2012	401	17	F	Anslescscr Maren P		1601
▶ Aguassscr	Muoi	B	A	12	2011	401	18	F	Aguassscr Kala Y		821
▶ Agudeloscscr	Otha	S	I	GD	2008	401	21	M	Agudeloscscr Rosela R		516
▶ Agudeloscscr	Paola	H	I	GD	2009	401	20	F	Agudeloscscr Rosela R		516
▶ Agudeloscscr	Walton	Y	I	13	2006	401	23	M	Agudeloscscr Rosela R		516
▶ Anslescscr	Winston	T	I	08	2015	203	14	M	Anslescscr Maren P		1601

Figure 48 - The second 10 records included in the browse according to the Last Name, with a custom sort on the page by those students’ First Names

Cloning a Filter

If you need a new filter for a Browse View that is similar to a filter you already have, you can clone the filter and change the parameters rather than create a new filter. If you need a complex filter, cloning can save time because you can clone an elaborate filter and make minor adjustments.

To clone a filter:

1. Go to a Browse screen (for example, Student Management\Families\FA\FA).
2. Click Filters and select the filter that you want to clone.
3. Click Clone Filter (Figure 49).
4. Configure the Modify Filter screen.
5. Click Save and Apply Filter.

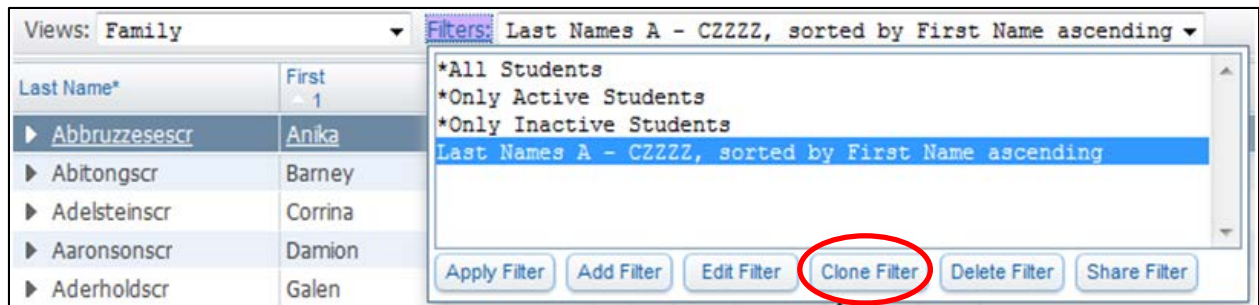


Figure 49 - Cloning a filter

Sharing a Filter

After you create a custom filter, you can share the filter with another user or with all users. Users whom you share the filter with, can access the shared filter from the view that you shared the filter from.

To share a filter:

1. Go to a Browse screen (for example, Student Management\Families\FA\FA).
2. Click Filters and select the filter that you want to share.
3. Click Share Filter.
4. Do one of the following:
 - To share the filter with all users (with security to access the area that the filter is in), click All Users.

Note Any secured users created after the filter was originally shared with All Users do not have access to the shared filter unless the shared filter's creator shares it with All Users again.

- To share the filter with one user, click One User and select a user.
5. Click Save.

When you share a filter with another user, it appears in their list of available filters and is highlighted in pink with “(shared)” next to it (Figure 50).

Note If a user shares a filter with you and then deletes that filter (or if the user’s account is deleted), the filter that they shared with you remains available for you to use, but it is no longer identified as “(shared).”

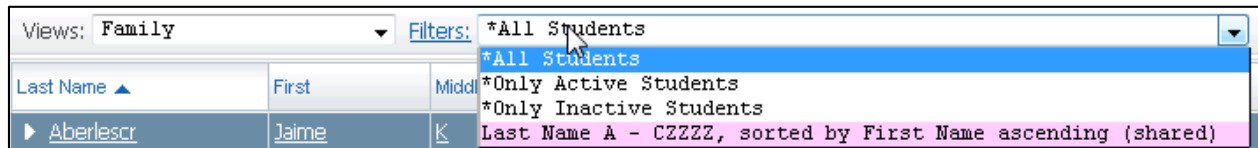


Figure 50 - The "Last Names A - CZZZZ, sorted by First Name ascending" filter is highlighted in pink because it is a shared filter.

Deleting a Filter

You may want to delete filters when they are no longer needed. You can also delete filters that have been shared with you. Filters with an asterisk next to their name cannot be deleted.

Note When you delete a filter that was shared with you, the filter is removed from your list only. The original filter is not deleted from the sharing user’s list of filters.

When you delete a filter that you have shared, the filter is not deleted from the filter list of users that you have shared it with.

To delete a filter:

1. Go to a Browse screen (for example, Student Management\Families\FA\FA).
2. Click Filters and select the filter that you want to delete.
3. Click Delete Filter. The following message appears:

“Are you sure you wish to delete this filter?”

4. Click Delete Filter.


Using Quick Filters

You can also create a Quick Filter to select records that appear on the Browse screen. After you apply a Quick Filter it remains in effect on that screen until you delete it, reset it or select a different filter from the Filters box.

Adding a Quick Filter

Quick Filters let you filter the browse data by any column on the Browse screen.

To add a Quick Filter:

1. Go to a Browse screen (for example, Student Management\Families\FA\FA).
2. Click Quick Filter  (Figure 51).
3. Enter low and high values in the boxes below a column heading to limit the data that appears in that column. Do this for all columns for which you want to limit data.
4. (Optional) Click a column heading to sort by that column.
5. Click Apply Filter. An asterisk appears next to the column headings that you configured in Step 3.

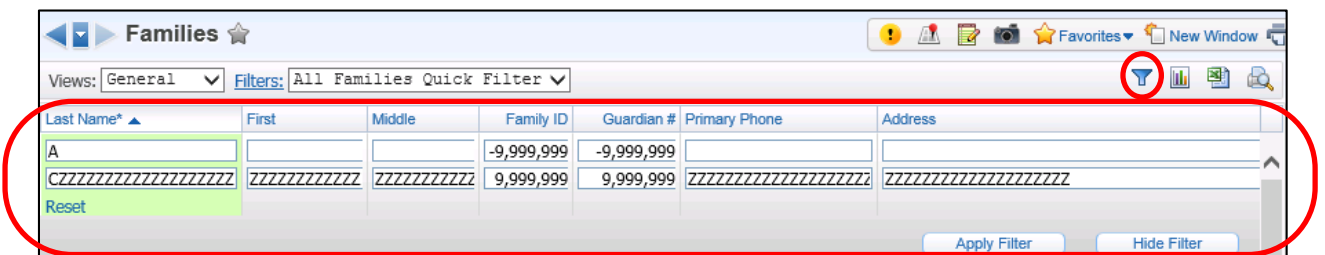



Figure 51 - The Quick Filter button opens the Quick Filter configuration options

Resetting a Quick Filter

You can reset a Quick Filter by resetting the configured columns.

To reset a Quick Filter:

1. Go to the Browse screen that contains the Quick Filter you want to reset.
2. Click Quick Filter. 
3. Columns that the Quick Filter is filtering on are highlighted in green. Click Reset below each column to remove the filter from that column (Figure 52).

Tip Scroll all the way to the right to make sure you reset all columns.

4. Click Apply Filter.

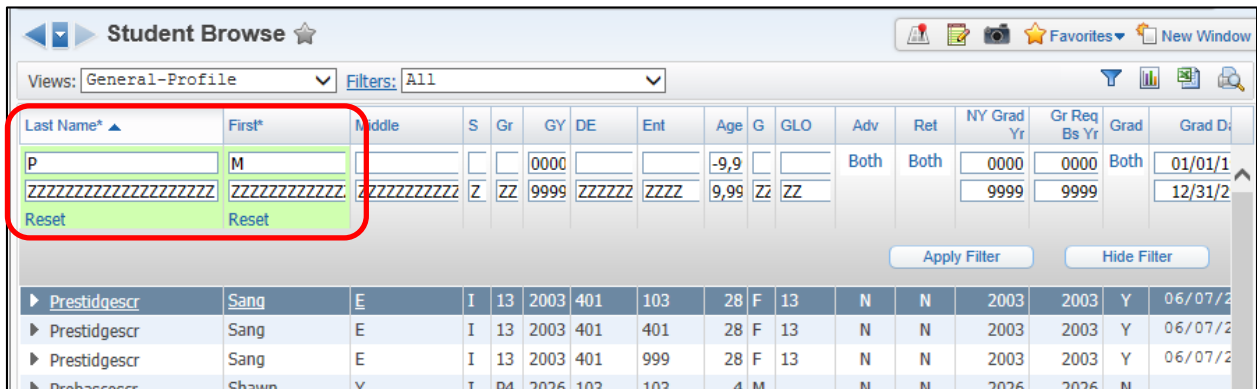


Figure 52 - Columns that the Quick Filter is filtering on are highlighted in green. The Reset button below each column resets the filter for that column.

Managing Slow-Loading Browse Filters

Sometimes, browse filters and customized browse settings can cause your browser to load slowly. For example, a filter may take a long time to load if you have selected more than 500 records to display.

To manage slow-loading browse filters:

1. Click Account in the upper-right corner of the screen.
2. Click Browse Filters. The Slow-Loading Browse Filters screen appears.

Note	The Load Time column shows you how many seconds each filter takes to load.
-------------	--

3. Expand one of the filters.
4. Do one of the following:
 - To remove customized browse settings from the Browse screen, expand the My Browse Settings area and click Delete Settings for this Browse.
 - To remove all filters from the Browse screen, expand the My Browse Filters area and click Delete All Filters.
 - To remove one filter from the Browse screen, expand the My Browse Filters area and click Delete for a single filter listed.
5. Click Back to close the Slow Loading Browse Filters screen.

Using Profile Screens

Profile screens (Figure 53) are available in Financial Management, Human Resources, and Student Management. On a Profile screen, you can view and edit record details using tabs, not headings, as you would on the Browse screen.

The screenshot shows the 'Employee Profile' screen for 'Ayoscr, Katie K'. The interface includes a sidebar with navigation tabs such as 'Employee', 'Tax - W4', 'Direct Deposit', 'Benefits', 'Deductions', 'Pay Records', 'Contracts', 'Flex', 'Check History', 'Calendar YTD', 'Fiscal YTD', 'W2', '1099R', 'Leave History', 'Time Off', 'Sub Tracking', 'Ins Tracking', 'Certification', 'Degrees', 'Credits', 'Position', 'Fast Track', 'UDF Tables', 'Emergency Contacts', 'Change History', 'Confidentiality Flag', 'Org Chart', and 'Task Manager'. The main content area is divided into several sections: 'Employee' information (Employee Type: CLASS SUB, User Name: emp178, Name ID: 14289, Building: BUILDING -4, Check Location: CHECK LOCATION -4), 'Customize' (Gender: F, Age: 37, Hire Date: 02/03/2012, Birth Date: 01/06/1975), 'Name' (Name Information: First: Katie, Middle: K, Last: Ayoscr, Name Key: AYOSCKAT000, Identification Numbers: SS #: 123-00-0529, Name ID: 14289, Employee ID: 513095, State ID: 00000000335), 'Personal Information' (Gender: Female, Birth Date: 01/06/1975, Marital Status: Married, Age: 37), and 'Race and Ethnicity' (Ethnicity: U.S. Citizen, Federal Race: 5-White, Local Race: White, non-Hispanic).

Figure 53 - Employee Profile screen in the Human Resources product line

Profile screens are available in several product areas. Though each product area has different information on its Profile screen, the general look and feel of Profile screens is the same. To learn how to navigate to Profile screens, see [“Navigating in Skyward’s School Management System”](#) (page 17).

Note Your security level may not give you to access the areas shown in this example. This example is intended to show you how to access a Profile screen.

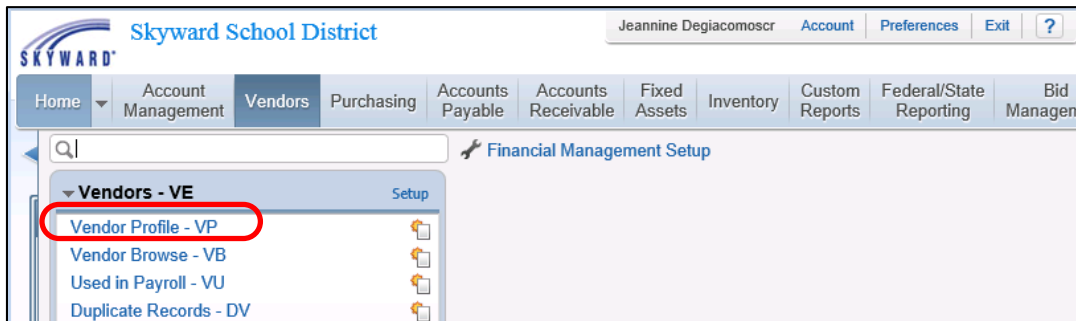


Figure 54 - The Vendor Profile is found in the Financial Management product line

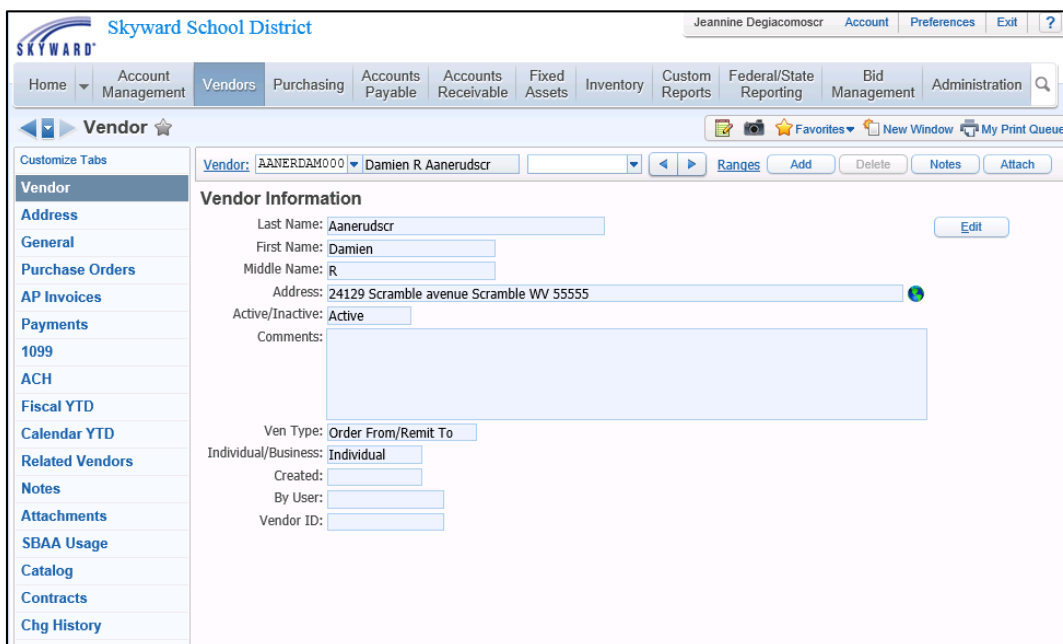


Figure 55 - The Vendor Profile contains information specific to individual vendors

Profile screens organize information using a row of tabs on the left side of the screen. Your security level determines which tabs appear. You can change the order of the tabs and remove tabs from the screen if you do not use them.

To customize the display of tabs on a Profile screen:

1. Go to the Profile screen you want to customize (such as Student Management\Students\ST\PR).

Note To learn how to follow this path, see “[Using Paths in WSIPC Product Guides](#)” (page 102).

2. Click Customize Tabs.
3. Configure the Customize Tabs screen.
4. Click Save.

Tip Click Reset to remove all customizations that you have applied.

Profile screens show nearly the same information as the Browse screen. For example, compare the headings on a Student Browse screen with the tabs on a Student Profile screen (Figure 56).

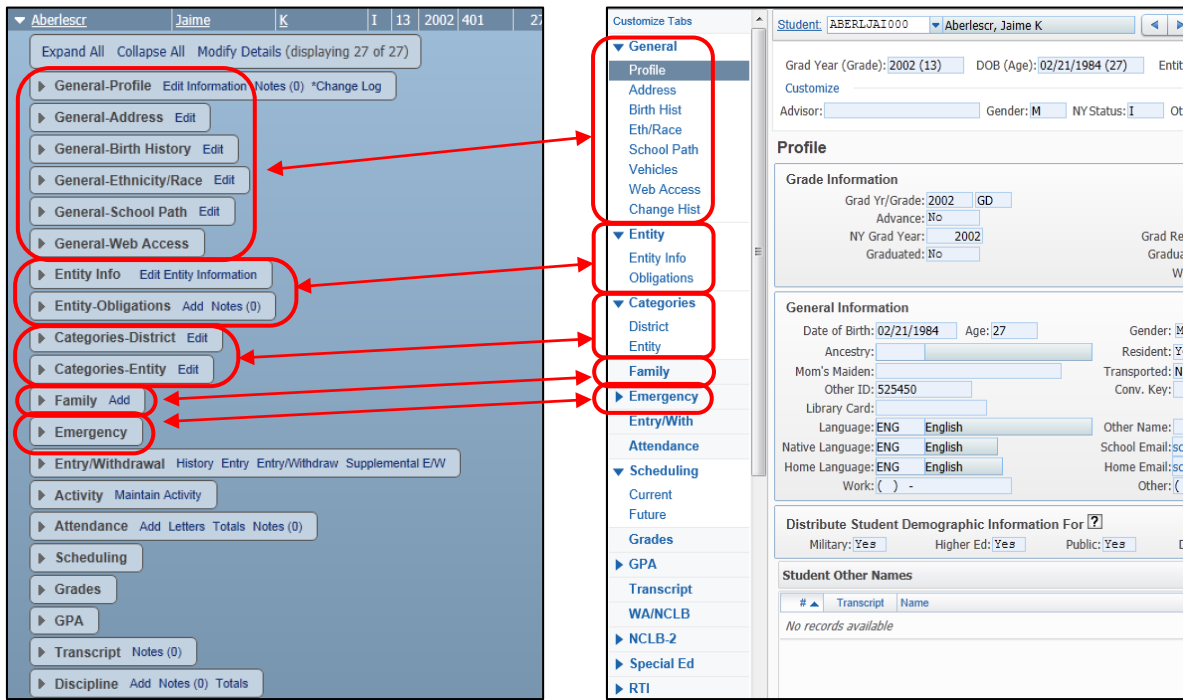


Figure 56 - Headings on the Student Browse screen (on the left) compared to the tabs on the Student Profile screen (on the right)

Understanding Common Screen Features

Figure 57 is a typical Edit screen in Skyward's School Management System. The fields on an Edit screen are most commonly represented by text boxes, check boxes, radio buttons, or menus. These features are described below.

Edit Name

1* SS#: 123-00-3984

Name Information

* First: Awilda Name Key: AAKREAWI000
Middle: A 1 Former:
* Last: Aakrescr 1 Spouse:
Prefix: Suffix: Name Used As: EMPLOYEE

Identification Numbers

1* SS#: 123-00-3984
Name ID: 24922
Employee ID: Gen
State ID:

Personal Information

* Gender: Female 1 Birth Date: Language:
1 Marital Status: 1 Age: 0
Veteran Status:

Race and Ethnicity

Ethnicity: Hispanic/Latino U.S. Citizen Multi-Race/Ancestry
Federal Race: 1-American Indian or Alaskan Native Local Race:
 2-Asian
 3-Black or African American
 4-Native Hawaiian or Other Pacific Islander
 5-White
Race/Ethnicity Verified On:
Race/Ethnicity Verified By: Not Verified District Staff Individual Staff

(*) Denotes Confidential Information
Asterisk (*) denotes a required field

Figure 57 - An Edit screen in Employee Profile

Field Names with an Asterisk

An asterisk next to a field name indicates that data is required for that field. For example, First (name), Last (name), and Gender are all required data elements for the Edit screen shown in Figure 57 (page 58). You cannot save the screen without filling in the required information. Fields without an asterisk, such as Employee ID and Birth Date, are not required data elements and can therefore be left empty.

Field Names That Are Underlined

If a field name is underlined, a list of selections is associated with that field. For example, in Figure 57 (page 58), Prefix, Suffix and Language all have associated selections. If you click an underlined field name, a screen appears showing selections for that field. Figure 58 shows the Language Codes screen which appears when you click the Language field name.

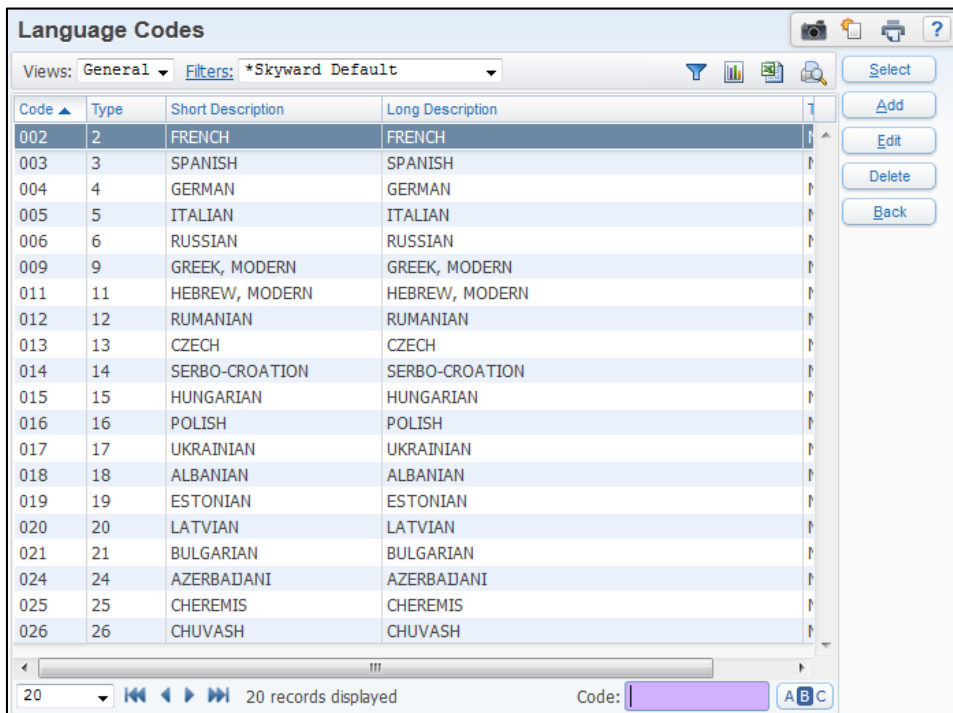


Figure 58 - The Language Codes screen appears when you click the Language field on the Edit Name screen

If the box for an underlined field is empty, you can click the arrow to see a menu of possible selections for a field. In Figure 59, the arrow to the right of the Language field has been clicked rather than the Language field name itself.

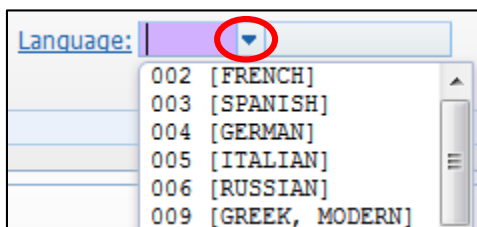


Figure 59 - The Language menu list

Finding Table and Field Names

You can see table and field name information for almost any field that appears on an Edit screen. To do so, use your mouse to click in the field's entry box and press the ALT and F2 keys simultaneously on your keyboard. When you do this, a screen opens showing the table name and field name separated by a period (Figure 60). This information is helpful if you create Crystal Reports.

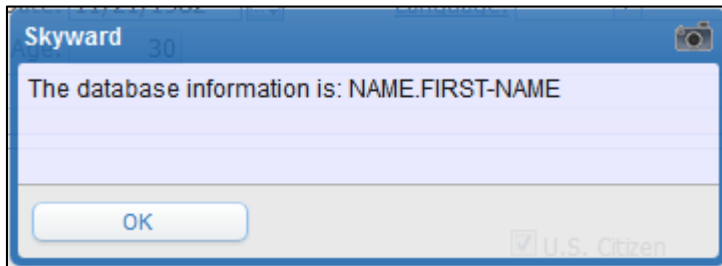


Figure 60 - Table and Field Name for a data element

Using the Toolbar Menu


The toolbar menu (Figure 61) appears at the top of many screens in Skyward's School Management System.




Figure 61 - Toolbar Menu

Your location in the software and your Preferences settings determine which items appear in the toolbar. For example, the Student Locator does not appear in the toolbar menu if you are currently in the Financial Management system. The items that appear in the toolbar are described below.


Alert


The Alert button  may appear at the top of your Home screen as a button on your toolbar. The Alert button appears if something needs your approval such as online registration verifications or employee time-off requests. This button is available only for users who have permission to authorize the entry of this kind of information.

Student Locator

The Student Locator  button on the toolbar is available only to Student Management users. It is not found in either the Human Resources or Financial Management areas of the software. When you click Student Locator, enter the student's name in the Student box to locate a student. Once you enter the student's name into Student Locator, a screen appears containing that student's demographic and scheduling information. This allows you to determine a student's location (according to their schedule) without navigating away from the area you're in.

Notes

You can use the Notes  button to add a note that is specific to the area you're in when you add the note. Because these notes can be shared with all users in the district, notes can help provide procedural information to people who access a specific area.

For example, a Health administrator can add a note about a business practice users should follow when performing a specific task and then make the note available to all users. If the Notes button is followed by a number in parentheses , that number of notes already exists for that area.

In some cases, a note may contain sensitive information that should not be shared within the district. Use the Protect Note option to protect a note from being viewed, edited, or deleted. Only the person who adds the protected note can view it. The Notes screen (Figure 62) shows a note that is protected and therefore cannot be edited or deleted. The Y in the Protected (P) column indicates that this is a protected note.

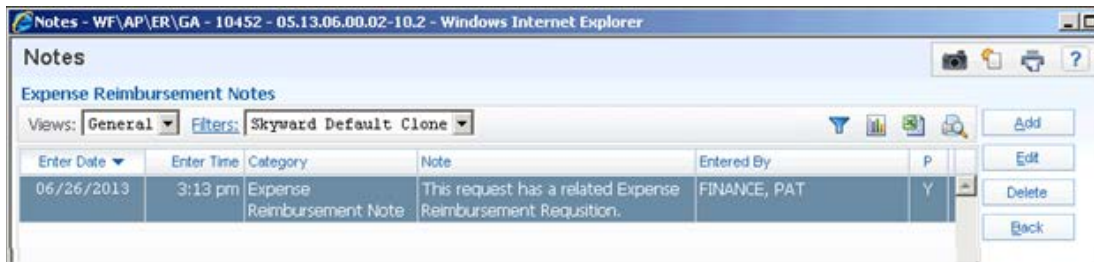



Figure 62 - Notes screen showing a protected note

Capture Screen

You can use the Capture Screen button  to take a screen shot of the information on your screen. This screen shot is sent to the Print Queue and is saved as a PDF.

Favorites

The Favorites option lets you bookmark areas of the software so that you can get to another area with a single click. Filters and views are not included as part of the Favorites bookmark. When you use a Favorites bookmark to go to an area of the product, the screen displays the view and filter that you used the last time you visited that screen. It does not display the view and filter that you used when you saved the screen as a Favorite in the first place.


Example You create a filter that includes only 12th grade students. You save the Student Browse screen as a Favorite and then change the filter to show only 11th graders. The next time you use this Favorites bookmark to go to Student Browse, you see the list of only 11th graders. This is because the Favorites bookmark does not include the filter as part of the bookmark.

You can add an area to your Favorites using the Favorites button or Star button. Both ways are described below.

Using the Favorites Button to Add a Favorite

You can use the Favorites button to quickly add an item to your Favorites. When you use the Favorites button, you choose the name for the Favorite.

To use the Favorites button to add a Favorite:

1. Navigate to the screen you want to mark as a Favorite.
2. Click Favorites on the toolbar menu. The image shows a toolbar menu button with a yellow star icon and the text "Favorites" followed by a small downward-pointing arrow.
3. Click the Add [name of the Area] To Favorites menu item that appears in the list (Figure 63).

Tip To edit or update your Favorites later, click Edit Favorites below the Add [name of the Area] To Favorites menu item.

4. In the Description box, type a name for this Favorite.
5. Click Save.

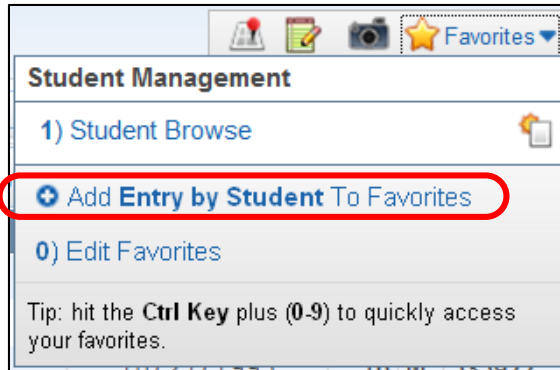


Figure 63 - Adding a Favorite to the Favorites menu

Using the Star Button to Add a Favorite

You can use the Star button to quickly add an item to your Favorites. When you use the Star button, you are not prompted to type a name for the Favorite. The name is created automatically.

To use the Star button to add a Favorite:


1. Navigate to the screen you want to mark as a Favorite.
2. Click the gray Star button  next to the name of the module. The Star button turns yellow to indicate that the module has been added to your Favorites. Figure 64 shows an example of the yellow Star button.




Figure 64 - The Star button is yellow when a module is in your Favorites

Navigating to a Favorite

Regardless of how you added a favorite (using the Favorites button or the Start button), you navigate to your favorites using the same methods.

To quickly navigate to an area you've stored in Favorites:

1. Click Favorites on the toolbar.
2. Do one of the following:
 - To open the Favorite on the current screen, click the menu item for the Favorite you want to navigate to (Figure 65).
 - To open the Favorite in a new window, click the Open in a New Window button  next to the Favorite you want to navigate to (Figure 65).

Tip Use the shortcut keys you configured in Preferences to access Favorites. To learn how to configure shortcut keys in Preferences, see [“Setting Your Preferences”](#) (page 87).

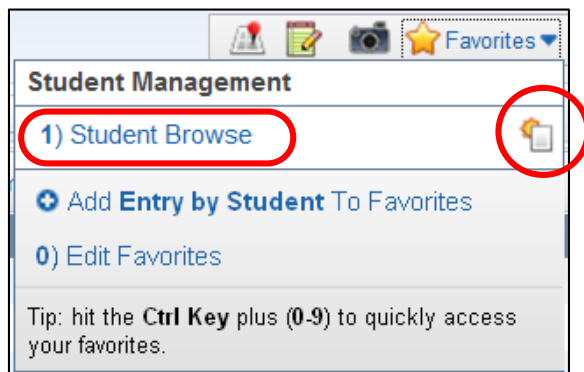





Figure 65 – The Favorite menu with a Favorite menu item and the Open in a New Window button highlighted

Creating a New Window

The New Window  button opens a duplicate screen of the screen you're viewing. You can then navigate to a different area of the software using the new screen. This allows you to work in two different areas simultaneously. You can do this anywhere in the software where you see this button.

Example To view a student's Attendance Records while entering discipline information, click New Window  to open a separate screen.

Tip You can open a module in a new window. For example, you may need to compare records that are in two different modules and you need to see them at the same time. This can be done easily when you click the  button (Figure 65).

My Print Queue

The My Print Queue screen shows reports you've recently run and the status of each report. When you run a report, it has a Queued status, then it changes to a Running status, and when it is done it changes to a Completed status. If a report fails before it's done, an Error status appears (Figure 66). Table 7 describes the buttons on the Print Queue screen.

District settings typically determine how long a report remains in the Print Queue area. The statement "Records above are automatically deleted after X days" appears in the lower-left corner of the My Print Queue screen (Figure 66) and shows the number of days reports may be accessible in your Print Queue.

Note If your district shares the same Program Server with other districts in your Information Service Center, the number of days your reports are retained can be less than the number that appears at the bottom of the Print Queue screen. The lowest setting is used for *all* districts on that server. For assistance with your district's report settings and how these settings work with other districts in your Information Service Center, contact your system administrator.

While you can use the Print Queue to see a report you've run, you may also use it to schedule, monitor, and save reports if you have the necessary security levels. To learn more about the functions available from the Print Queue screen, see Table 7.

Tip To quickly navigate to My Print Queue from any area:

- Click the  button (Figure 66).

My Print Queue

Print Queue for Alice Aderholdscr

Date	Time	Report Description	Wait List #	Status	Time	Format	Current Key
06/28/2015 Sun	6:24 PM	Student Information - Student Info	1	Queued	00:00:04	PDF	Loading St
06/28/2015 Sun	6:24 PM	Student Information - Student Info		Running	00:00:05	PDF	
06/28/2015 Sun	6:22 PM	Student Information - Student Info		Completed	00:00:58	PDF	
06/28/2015 Sun	6:22 PM	Student Information - Student Info		Completed	00:01:00	PDF	
06/28/2015 Sun	6:20 PM	Student Information - Student Info		Completed	00:01:01	PDF	
06/28/2015 Sun	6:12 PM	Pay Distribution Report - Distribution		Error	00:00:00	PDF	
06/28/2015 Sun	6:10 PM	Inventory Worksheet - All Titles for Campus 401 (by		Completed	00:00:00	PDF	
06/28/2015 Sun	6:09 PM	Turn Around Time - Discipline Turnaround Time		Completed	00:00:05	PDF	
06/28/2015 Sun	6:09 PM	Student Data Mining - 3-Yr Reveals Due		Completed	00:00:20	PDF	

9 records displayed

Records above are automatically deleted after 2 days.

Figure 66 - The Print Queue containing reports in various statuses. The number of days reports may remain in the Print Queue is listed at the bottom of the screen.

Button	Function
View	Opens the report in PDF format.
Delete	Permanently deletes the report from the Print Queue.
Rerun	Reruns the report with the same parameters you set when you originally generated the report.
Convert to Excel	<p>Opens the report in a spreadsheet. You can select a Simple Dump (exports the data as it appears on the report) or an Advanced Dump (exports the data by merging associated data into one line) and choose from these formats:</p> <ul style="list-style-type: none"> CSV/Microsoft Office 2000 Microsoft Office 2002+ Microsoft Office 2007+ (xlsx)

Button	Function
	<ul style="list-style-type: none"> ▪ Open Office
View Status	Shows the run status of the report.
Tasks	<p>Opens the Tasks screen which allows you to schedule or monitor a task. To learn about scheduling or monitoring tasks, see “Scheduling and Monitoring Tasks” directly below this table.</p>
Centralized Printing	<p>Opens the Centralized Printing screen which allows you to select printer options and add a report to the centralized print queue if you have the necessary security level.</p> <p>Note: This option is only available if your district is configured to use Centralized Printing.</p>
Save this Report	<p>Saves the report in your My Saved Reports folder.</p> <p>Note: This option is only available if you select a completed report in My Print Queue.</p>
Saved Reports	Allows you to view, copy, and edit your saved reports. You can also configure the folders where you save your reports.

Table 7 - Description of buttons on the Print Queue screen

Scheduling and Monitoring Tasks

When you click the Tasks button on the My Print Queue screen, the Tasks screen opens. From the Tasks screen, you can schedule and monitor tasks. Table 8 describes the options on the Tasks screen.

Note	You must have the appropriate security level to schedule tasks. Consult with your district's security administrator if you need to access Tasks.
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Button	Function
Schedule This	Opens the Scheduled Task Maintenance screen where you define a report's schedule parameters (Figure 67). A Scheduled Task defines when a report runs (days of the week, weeks of the month, months of the year) and for what period of time a report runs (beginning and ending date). Scheduled Tasks run only once for the selected time period.
Scheduled Tasks	Opens the Scheduled Tasks screen where you can modify the parameters of any Scheduled Task you've defined.
Monitor This	Opens the Monitoring Task Maintenance screen where you define the report's monitoring parameters (Figure 68). A Monitored Task defines when a report runs (days of the week, weeks of the month, months of the year), for what period of time a report runs (beginning and ending date), and how often (in minutes) a report automatically runs. Unlike Scheduled Tasks, a Monitored Task can run several times during a single day.
Monitoring Tasks	Opens the Monitoring Tasks screen where you can modify the parameters of any Monitored Task you're previously defined.

Table 8 - Descriptions of the options on the Tasks screen

Scheduled Task Maintenance

Task Information
Task Status: Active Inactive Entity:
* Task Description:
Task cannot be synchronized because there is no associated template. ?
* Start Date: * Start Time:
* End Date:

Day(s) of the week
 Mon Tue Wed Thur Fri Sat Sun

First Second Third Fourth Fifth Sixth

Month(s) of the year
 January February March April May June
 July August September October November December

Additional Export Options
Spreadsheet Format:
Spreadsheet Format will only apply to reports that produce spreadsheets
Email Results To:
Export Location:

Task Manager
 Add to Notifications widget in SkyPort when completed.
User Selection:
Selected Names:

Asterisk (*) denotes a required field

Figure 67 - Scheduled Task Maintenance screen

Monitoring Task Maintenance

Task Information

Task Status: Active Inactive Entity: 401

* Task Description: Student Data Mining - 3-Yr Reveals Due

Task cannot be synchronized because there is no associated template. ?

* Start Date: 06/28/2015 Sunday * Start Time: 07:00 AM

* End Date: 12/31/2999 Tuesday * Stop Time: 06:00 PM

Frequency (Mins): 30 (One Day - 1440 | 12 Hours - 720 | 6 Hours - 360 | 3 Hours - 180)

Day(s) of the week

Mon Tue Wed Thur Fri Sat Sun

Week(s) of the month (1-6)

First Second Third Fourth Fifth Sixth

Month(s) of the year

January February March April May June
 July August September October November December

Additional Export Options

Spreadsheet Format: User Preference ?
Spreadsheet Format will only apply to reports that produce spreadsheets

Email Results To:

Export Location: ?

Asterisk (*) denotes a required field

Figure 68 - Monitoring Task Maintenance screen

Managing Tasks

After you create a Scheduled Task and Monitored Task, you can edit, delete and view the task from your Print Queue. If you don't want to wait for the task to run based on the configured schedule, select the task and click Run Now (Figure 69).

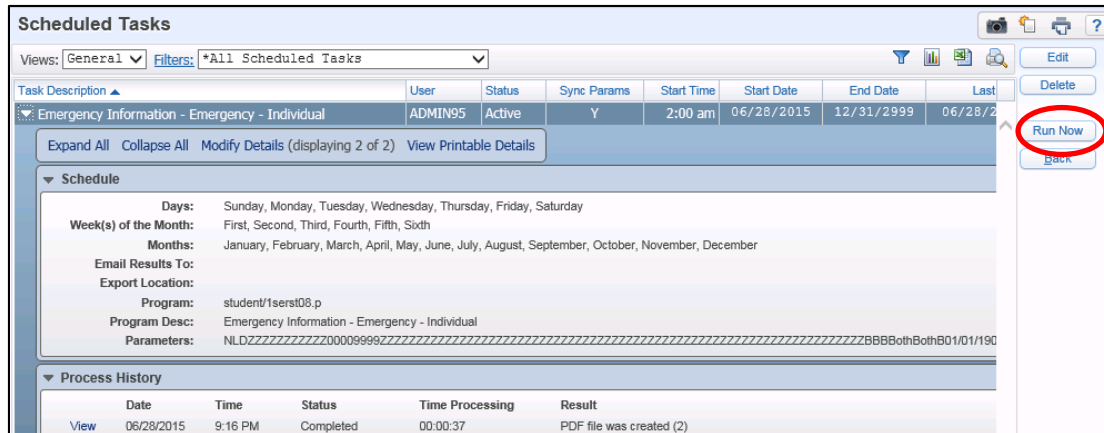


Figure 69 - You can click Run Now to immediately run a report

Scheduling a Report to Run Daily or Several Times a Day

In the Day(s) of the week, Week(s) of the month (1-6), and Month(s) of the year areas, select all the check boxes to have the print job run daily. If you want a report to run several times in a day, create several Scheduled Tasks with different start times.

Restrictions for Scheduled Tasks

Scheduled Tasks should run between 4:30 AM and 10:30 PM to avoid conflicts with nightly server maintenance.

Working with Saved Reports

After you run a report, you can save it to your district's Program Server. This is an especially helpful option because the report is retained on the server until it is deleted. Saving a report ensures that a report is accessible after it can no longer be opened from My Print Queue.

Saving a Report

Once you run a report, you can save an electronic copy to a designated folder on the Save this Report screen (Figure 70).

To save a report:

1. Go to My Print Queue.
2. Locate and select the desired report.

Note If the report is no longer available on the Program Server, the following message appears: "Unable to print queue file." Click OK. You must run the report again in order to save it.

3. Click Save This Report.
4. Configure the Save this Report screen (Figure 70). Table 9 describes the options on this screen.
5. Click Save.

The screenshot shows a dialog box titled "Save this Report". It has a light blue header. Below the header, there are several input fields and buttons. The "Report Name" field contains "Emergency Information - Emergency - : X". The "Menu Path" field contains "WS\ST\RE\EI - Emergency Information". The "Folder" field contains "My Saved Reports" and is highlighted with a blue selection bar. To the right of these fields are "Save" and "Back" buttons. Below the "Folder" field is a checkbox labeled "Share this Report with Others". At the bottom, there are two more text boxes: "Batch:" and "Report Comment:".

Figure 70 - After a report is run, it can be permanently saved on your district's Program Sever

Option	Description
Report Name	Name of the saved report. You can edit the report's name.
Menu Path	Navigation path of the saved report. You can't edit this field.
Folder	Name of the root or sub-folder that the saved report is stored in. Note: My Saved Reports is the root folder and it cannot be deleted or renamed.
Share this Report with Others	Makes the saved report accessible to other Secured Users.
Batch	Washington State does not use this option.
Report Comment	Allows you to notate additional information regarding the saved report.

Table 9 - Description of options on the Save this Report screen

Selecting and Managing a Report

Once you save a report, you can select it from the My Saved Reports screen (Figure 71). If another Secured User has shared a saved report, you can also select the report if you have the necessary security access. You can view, copy, edit, and delete saved reports. You can also share saved reports and maintain folders for saved reports

Note	If your security access to a report template's menu path is deleted after you save a report, you will no longer be able to access the report. For assistance in accessing a saved report that is no longer accessible, contact your security administrator.
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To select and manage a report:

1. Go to My Print Queue.
2. Click Saved Reports.

3. In the Saved Reports to Show area, do one of the following to select a report:

- To select a saved report that you have run from the list, click My Saved Reports.
- To select a saved report by a menu path that you have security access to, click Reports by Menu Path. Type the menu path in the Menu Path box, and then click Refresh.

Note If you don't have security access to the menu path, the following message appears: "You do not have security access to this menu path." Click Refresh.

- To select a saved report created by another Secured User, click Reports by User. Type the user's alpha key in the User Alpha key box, and then click Refresh.

4. To manage the selected report, use the other options on the My Saved Reports screen as desired (Figure 71). Table 10 describes the options on this screen.

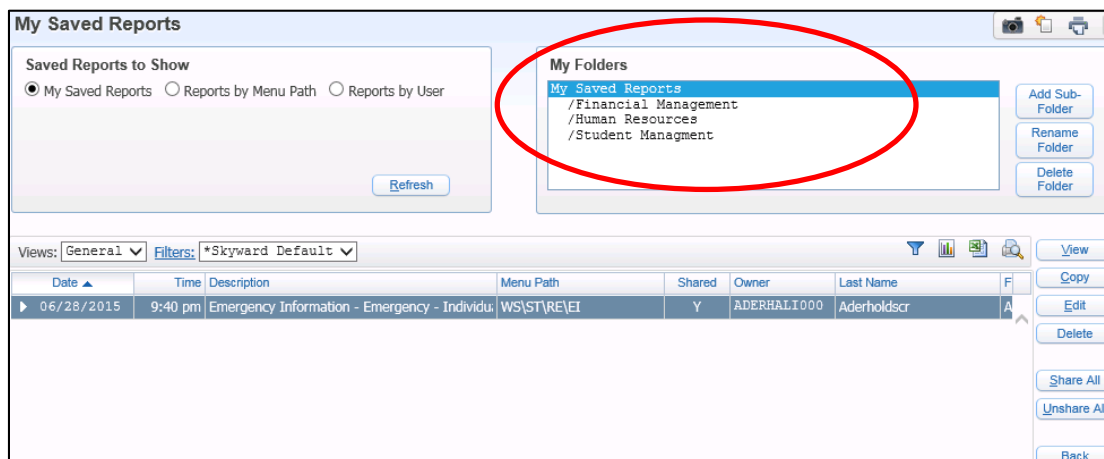


Figure 71 - Example of how you can add sub-folders to the root folder to organize your saved reports

AREA	PURPOSE OF AREA
My Saved Reports	Determines how saved reports are accessed.
Options in This Area	Description of Options
My Saved Reports	<p>Allows you to access your saved report from the root or sub-folder.</p> <p>Tip: When you save a report, the default folder is the root folder, <i>My Saved Reports</i>. You can add sub-folders to help organize your reports.</p>
Reports by Menu Path	<p>Allows you to access a saved report using the navigation menu path. When you select this option, the My Folders is not accessible. To learn about navigation menu paths, see “Using Paths in WSIPC Product Guides” (page 102).</p> <p>Note: You can only access saved reports that you have security access to. The following message appears if you don’t have security to the menu path: “You do not have security access to this menu path.”</p>
Reports by User	<p>Allows you to access reports saved by another Secured User if they have configured the Share this Report with Others option.</p> <p>Note: System-Wide Users have access to all secured user’s saved reports.</p>
Refresh	Updates the report list after you select and configure Reports using the by Menu Path and Reports by User options.

AREA	PURPOSE OF AREA
My Folders	Determines how saved reports are saved to the root folder or to sub-folders.
Options in This Area	Description of Options
Add-Sub Folder	Adds a sub-folder to the My Folders area.
Rename Folder	Edits the name of a sub-folder you created.
Delete Folder	Deletes a sub-folder you created.
AREA	PURPOSE OF AREA
Saved Reports Buttons	Determines how saved reports are managed.
Options in This Area	Descriptions of Options
View	Opens a saved report.
Copy	Copies a saved report to another folder.
Edit	<p>Opens the Edit Report screen where you can modify saved report options.</p> <p>Note: You cannot edit another user's saved report options unless you are a user with System Wide Access.</p>
Delete	<p>Removes your saved report from the stored folder.</p> <p>Note: You cannot remove another user's saved report unless you are a user with System Wide Access.</p>
Share All	Shares all of your saved reports with other Secured Users.
Unshare All	Makes your saved reports inaccessible by other Secured Users.

Table 10 - Description of options on the My Saved Report screen

Running Reports

There are two type of reports in the Skyward's School Management System: canned reports and user-created reports. Canned reports are those created by Skyward and user-created reports are those you or another user in your district has created.

When you click on a report name, a template screen for that report appears (Figure 72). A report's template screen contains all of the templates that have been created for the report. Each template has a Template Type of User, Entity, District, or Skyward.

Table 11 describes each template type and the tasks that you can perform on the report template's screen.

Template Type ▲	Description	Created By
1) User	Emergency - Individual	Aderholdscr, Alice Z.
4) Skyward	Emergency Information	Aderholdscr, Alice Z.

Figure 72 - Report Template screen with Template Type highlighted

Template Type	Description
User	Template that you have created.
Entity	Template shared with all other users in the Entity it was created under. Entity templates are available only in Student Management. Only the user who initially created an Entity template can edit or delete it.
District	Template shared with all other users in the district. District templates are available only in Human Resources and Financial Management. Only the user who created a district template can edit or delete it.
Skyward	Template that Skyward has created. These templates cannot be edited or deleted.

Table 11 - Template Types

Adding a User-created Template

If none of the existing templates meet your needs, you can create your own. You can also share your templates with other users.

To add a user-created template:

1. Go to a report's template screen.
2. Click Add.
3. Configure the template and do one of the following:
 - If you're using the Financial Management or Human Resources product line and want to share your template, select the Share this template with other users in the District check box.
 - If you're using the Student Management product line and want to share your template, select the Share this template with other users in Entity xxx check box.

Note If you select the Print Greenbar option, the report prints horizontal green lines in the background for every other line. The green color prints only if you print to a printer with color ink or toner. Otherwise, the green lines prints in a shade of gray.

Tip The Reports Generator allows you to run reports using pre-defined configuration templates. To add or select a Reports Generator template, select By Reports Generator Ranges and click Reports Generator. To learn more about the Reports Generator, see the *WSIPC Guide to Student Data Mining*.

4. Click Save or Save and Print.

Note If you click Save and Print, the report process runs in the Print Queue. To learn how reports run in the Print Queue, see “[Understanding How Reports Run in the Print Queue](#)” (page 81).

Editing a User-created Template

Before you print a report, you can edit templates that you created. You can also edit report templates and save them without printing the report.

Note You can edit only the templates that you created.

To edit a user-created template:

1. Go to a report’s template screen.
2. Select the template you want to edit.
3. Click Edit.
4. Configure the report template.
5. Click Save or Save and Print.

Printing a Report from an Existing Template

You may not need to make any changes to an existing report template before printing the report. In this case, you can print directly from the template.

To print a report from an existing template:

1. Go to a report's template screen.
2. Select the template you want to use to generate the report.
3. Click Print.

Note	If you click Print, the report process runs in the Print Queue. To learn how reports run in the Print Queue, see “Understanding How Reports Run in the Print Queue” below.
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Understanding How Reports Run in the Print Queue

This section shows you how reports run in the Print Queue. To learn about the Print Queue, see [“My Print Queue”](#) (page 66).

After you click Print, a processing request is sent to the Print Queue. One of the following happens:

- If no other reports are running, the report begins processing and the Processing Request screen appears (Figure 73).
- If other reports are running, the report is placed in Queued status and the Request Queued screen appears (Figure 74).

Tip	Working in the Software While a Report is Running or Queued To continue working elsewhere in the software while the report is running or waiting in queued status:
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- Click Back to close the screen and return to the report's template screen (Figure 73 and Figure 74).

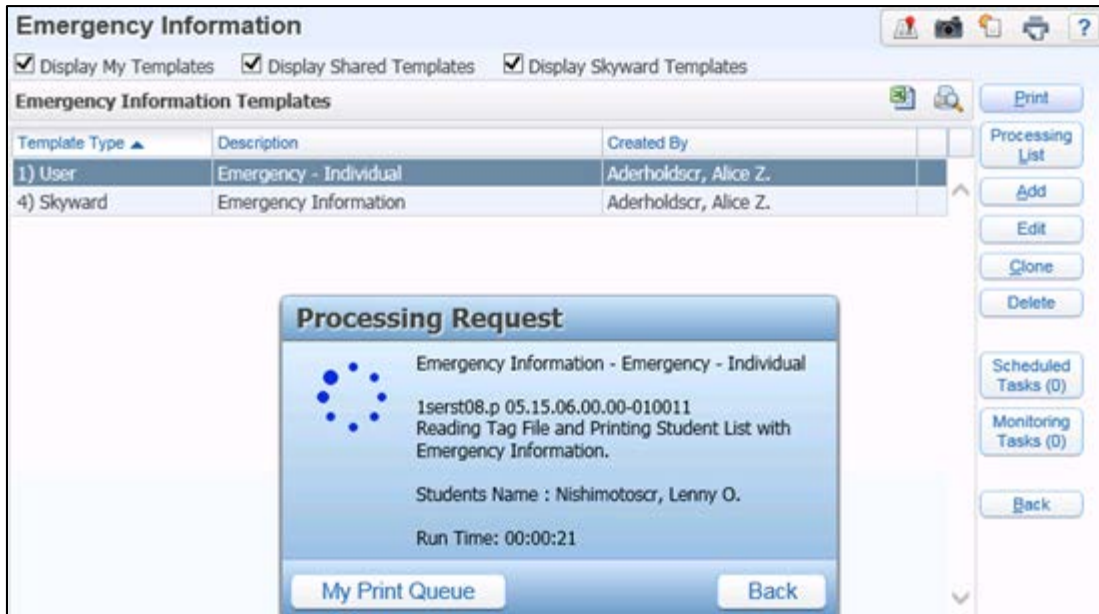


Figure 73 - Processing Request screen for a report that is processing

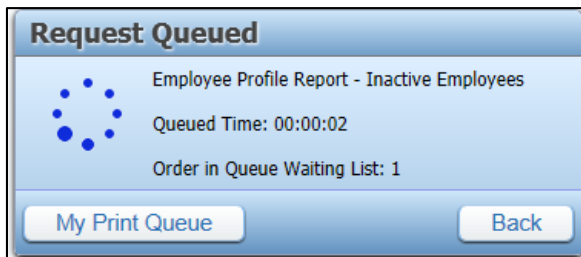


Figure 74 - Request Queued screen for a report that has been sent for processing

Viewing a Report from the Request Complete Screen

If you didn't close the Report Processing screen or the Request Queued screen before the request was complete, when the report finishes processing the Request Complete screen appears and you can view the report from this screen.

Note If you closed the Report Processing screen or the Request Queued screen, see "[Viewing Reports in Your Print Queue](#)" (page 83) to learn how to view the report.

To view the report from the Request Complete screen:

- Click the View Report button or the underlined report title on the Request Complete screen (Figure 75).





Figure 75 - Request Complete screen for a report that has finished processing

Viewing Reports in Your Print Queue

If you closed the Report Processing screen or the Request Queued screen, you can return to your Print Queue to view your report or any report you ran earlier.

To view the reports in your Print Queue:

- Click the My Print Queue button ( or ) in the upper-right corner of the screen. To learn how to use the Print Queue, see "[My Print Queue](#)" (page 66).

Note District settings typically determine how long a report remains in the Print Queue area. The statement "Records above are automatically deleted after X days" appears in the lower-left corner of the My Print Queue screen and shows the number of days reports may be accessible in your Print Queue.

Cloning a Template

You can clone Skyward templates and user-created templates. Cloning a template is useful if you want to generate reports with similar but slightly different parameters, such as ranges of records.

To clone a template:

1. Go to a report's template screen.
2. Select the template you want to clone.
3. Click Clone.
4. Configure the cloned template and give it a new title description.
5. Click Save or Save and Print.

Note	If you click Save and Print, the report process runs in the Print Queue. To learn how reports run in the Print Queue, see " Understanding How Reports Run in the Print Queue " (page 81).
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Deleting a User-created Template

You may need to delete a template if, for example, it is no longer used. When you delete a template that you have shared with other users, it is removed from the list of available templates for those users as well.

To delete a user-created template:

1. Go to a report's template screen.
2. Select the template you want to delete.
3. Click Delete. A confirmation message appears.
4. Click Yes.

Note	You cannot delete a Skyward template or a template created by another user.
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Running a Report from a Processing List

Processing Lists allow you to assemble a list of names and to use that list of names when generating a variety of Financial Management, Human Resources, and Student Management Reports.

To learn more about using Processing Lists in Student Management, see the *WSIPC Guide to Processing Lists*.

Re-assigning Many Report Templates at Once

After a user is made inactive, you can use the Inactive User Report Cleanup Utility to re-assign their reports to another user. For example, if a report writer in your district separates from the district, you may need to re-assign the person's templates. As another example, you may also reassign templates from an outgoing administrator to the new administrator. See the *WSIPC Guide to Security* to learn more about this utility.

Making Changes to Your Account

The Account Menu appears in the upper-right corner of the screen (Figure 76). This menu allows you to perform tasks specific to your user account such as changing your password.

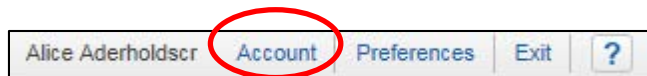


Figure 76 - Account Menu

Changing Your Password

You can change your password, but your password must conform to your district's password policy. To learn more about your district's password policy, contact your security administrator.

To change your password:

1. Click Account.
2. Click Change Password.
3. Type your current password and click Submit.
4. Enter a new password in the New Password and Confirm New Password boxes. This screen also shows your district's requirements for numeric values, special characters, the minimum length your new password must be, and how long you must wait before re-using a password.
5. Click Submit. When your password is changed, the following message appears:

"Account Updated Successfully."
6. Click OK.

Setting Your Preferences

Preferences control things such as how information looks in the software, what your shortcut keys are, and the format used when you export reports. You can set several Preferences that are specific to you.

Note Setting Preferences affects only your user account.

To set your Preferences:

1. Click Preferences in the upper-right corner of the screen.
2. Configure the User Preferences screen (Figure 77). Table 12 describes options on this screen.
3. Click Save.

User Preferences

Theme Color:

<input checked="" type="radio"/> Blue	<input type="radio"/> Red	<input type="radio"/> Pink
<input type="radio"/> Green	<input type="radio"/> Purple	<input type="radio"/> Black

-Reports-

Display **Open/Save Dialog** Before Displaying Reports

Automatically Open PDF Reports Upon Completion

Spreadsheet Format:

-Interface-

Dim Background When Displaying Alerts

Maximize Large Windows [?](#)

Disable Interface Animations [?](#)

Look Up Accounts by Account Dimension [?](#)

-Browses-

Automatically Display Popup Browse Details On Mouseover

Display Browse Row Numbers [?](#)

-Navigation-

Use System Name For Home Menu [?](#)

Display Data Mining Favorites in General Favorites Menu

Enable Favorites Heads Up Display [?](#)

Favorites Shortcut Key:

-Accessibility-

Show Icon Text [?](#)

Use Larger Font Sizes [?](#)

Use High Contrast Color Theme [?](#)

I'm Using a Screen Reader [?](#)

Use Enhanced Keyboard Navigation [?](#)

Display Tooltip for Element with Focus

-Window Titles- [?](#)

<input checked="" type="checkbox"/> Description
<input checked="" type="checkbox"/> Entity
<input checked="" type="checkbox"/> Path
<input checked="" type="checkbox"/> Menu ID
<input checked="" type="checkbox"/> Release

Figure 77 - User Preferences screen

AREA	PURPOSE OF AREA
Theme Color	Formats the color of your screens in the software.
AREA	PURPOSE OF AREA
Reports	Determines how reports are managed.
Options in This Area	Description of Options
Display Open/Save Dialog Before Displaying Reports	Allows reports to display properly on Mac computers running Firefox.
Automatically Open PDF Reports Upon Completion	Allows a completed PDF report to automatically open.
Spreadsheet Format	Format to be used when exporting Browse screen information to a spreadsheet.
AREA	PURPOSE OF AREA
Interface	Determines how screens and windows are managed.
Options in This Area	Description of Options
Dim Background When Displaying Alerts	Dims items in the background when an alert window appears on the screen.
Maximize Large Windows	Maximizes larger screens when you open them in your browser.
Disable Interface Animations	Turns off all interface animations such as menus fading in or out. Tip: Selecting this option may improve performance on computers with limited resources.
Look Up Accounts by Account Dimension	Automatically opens the Detail Account Selection screen in the Finance Management product line.

AREA	PURPOSE OF AREA
Browses	Determines how Browse screens are managed.
Options in This Area	Description of Options
Automatically Display Popup Browse Details on Mouseover	Causes a record's browse details to automatically appear when you pause your mouse pointer over one of the record's headings. To learn more about this option, see " Understanding Pop-up Browse Details " (page 92).
Display Browse Row Numbers	Causes a number to appear next to each record to indicate its placement in the list. In a list with 20 records, the top record would be number 1 and the bottom record would be number 20, regardless of how you sort the list.
AREA	PURPOSE OF AREA
Navigation	Allows you to configure navigation options.
Options in This Area	Description of Options
Use System Name for Home Menu	Causes the name of the current product line to appear in place of the word "Home" on the Home screen. For example, if you are using Student Management the Home button is renamed "Student Management."
Display Data Mining Favorites in General Favorites Menu	Displays Data Mining Reports that are marked as Favorites. To learn about Data Mining, see the <i>WSIPC Guide to Student Data Mining</i> .

Options in This Area	Description of Options
Enable Favorites Heads Up Display / Favorites Shortcut Key	Displays your Favorites menu as soon as you hold down the shortcut key for Favorites (the shortcut key you designated in the Favorites Shortcut Key box). To learn more about this option, see “ Understanding the Favorites Heads Up Display ” (page 93).

AREA	PURPOSE OF AREA
Accessibility	Determines how data in the software appears.

Options in This Area	Description of Options
Show Icon Text	Shows text next to unnamed buttons that explains what they do.
Use Larger Font Sizes	When enabled, the font sizes throughout the product increase to a larger size.
Use High Contrast Color Theme	Maximizes the contrast between the background and foreground colors.
I'm Using a Screen Reader	<p>Shortens the titles on browser windows to a description of the page to make these items easier to read for visually impaired users. A message also informs you when a pop-up is about to appear.</p> <p>Tip: Don't enable this option unless you are visually impaired and are using screen reader software.</p>
Use Enhanced Keyboard Navigation	Allows you to more easily navigate through a menu using the Tab key on your keyboard. This option also overrides the program's default cursor placement and instead causes the cursor to move across the page in a linear manner as you tab through the fields.
Display Tooltip for Element with Focus	Displays a short description of a button, field or hyperlink when you pause your mouse pointer over it.

AREA	PURPOSE OF AREA
Window Titles	Determines how page titles appear.
Options in This Area	Description of Options
Window Titles	Customizes the way the page title looks in your browser's title bar. To learn more about this option, see "Using the Window Titles Option to Customize Screen Titles" (page 94).

Table 12 - Options on the User Preferences screen

Understanding Pop-up Browse Details

As described in Table 12, the Automatically Display Popup Browse Details on Mouseover option causes a record's browse details to automatically appear when you pause your mouse pointer over one of the record's headings.

A browse detail pop-up lets you quickly see the browse details while you're on the Browse screen without having to expand the record's heading. If you select this option, when you pause your mouse pointer over the heading of a browse record the details appear in a pop-up box (Figure 78).

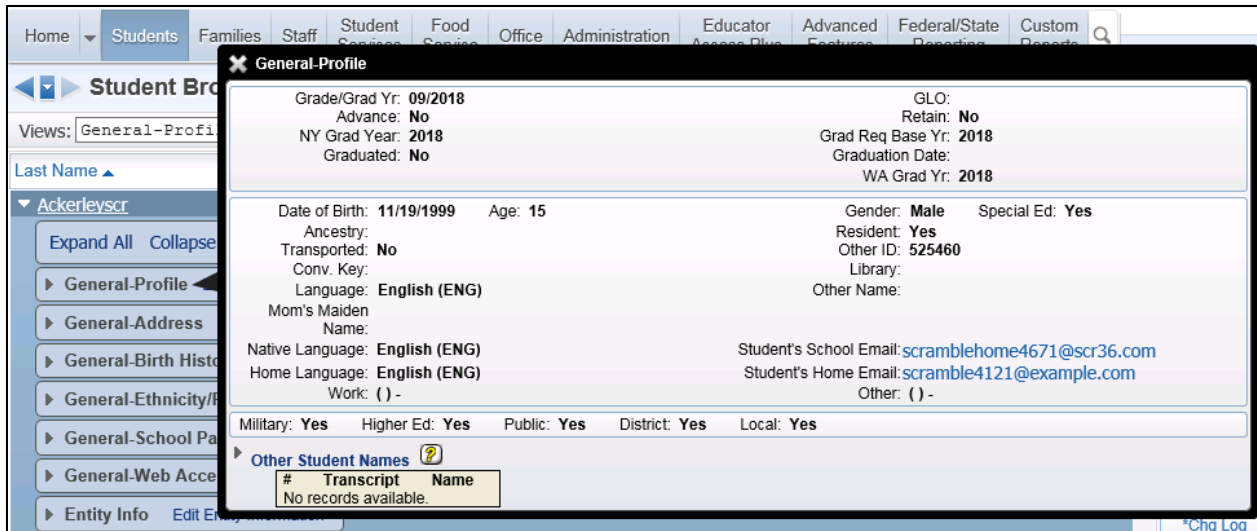


Figure 78 - When you pause your mouse pointer over the General-Profile heading for a record, a pop-up of the Browse Details for that heading appears

Understanding the Favorites Heads Up Display

As described in Table 12 (page 92), when you select the Enable Favorites Heads Up Display option you can choose a shortcut key to use in conjunction with the Favorites menu. This allows you to press the shortcut key and a number between zero and nine to quickly access your Favorites.

Figure 79 shows what the Favorites menu looks like when you select the Enable Favorites Heads Up Display option with the Ctrl key as the shortcut key. In this example, to access the first Favorite in the list, Student Browse, you would press Ctrl and 1 on your keyboard.

To learn more about using Favorites, see “[Favorites](#)” (page 63).

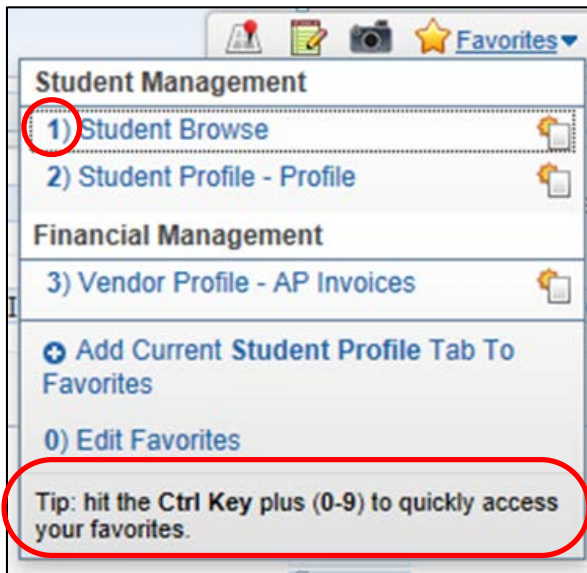


Figure 79 - Shortcut Keys assigned to Favorites menu items

Using the Window Titles Option to Customize Screen Titles

As described in Table 12 (page 92), the Window Titles option customizes the title display of the screen. This option determines the order in which information appears in your browser's title bar.

To use the Window Titles option to customize screen titles:

1. Click Preferences.
2. In the Window Titles area, click and hold your left mouse button while your mouse pointer is on the four-pointed arrow next to a title you want to move.
3. Drag the title to a new location.
4. Release the left mouse button.
5. Repeat steps 2 through 4 to move the other titles.
6. Click Save.

Figure 80 shows the Window Titles list that you use to specify title order. Figure 81 shows how the browser's title bar appears based on the configuration in Figure 80.

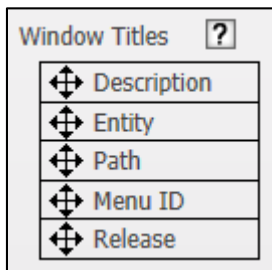


Figure 80 - Window title order. This determines the title order shown in Figure 81.

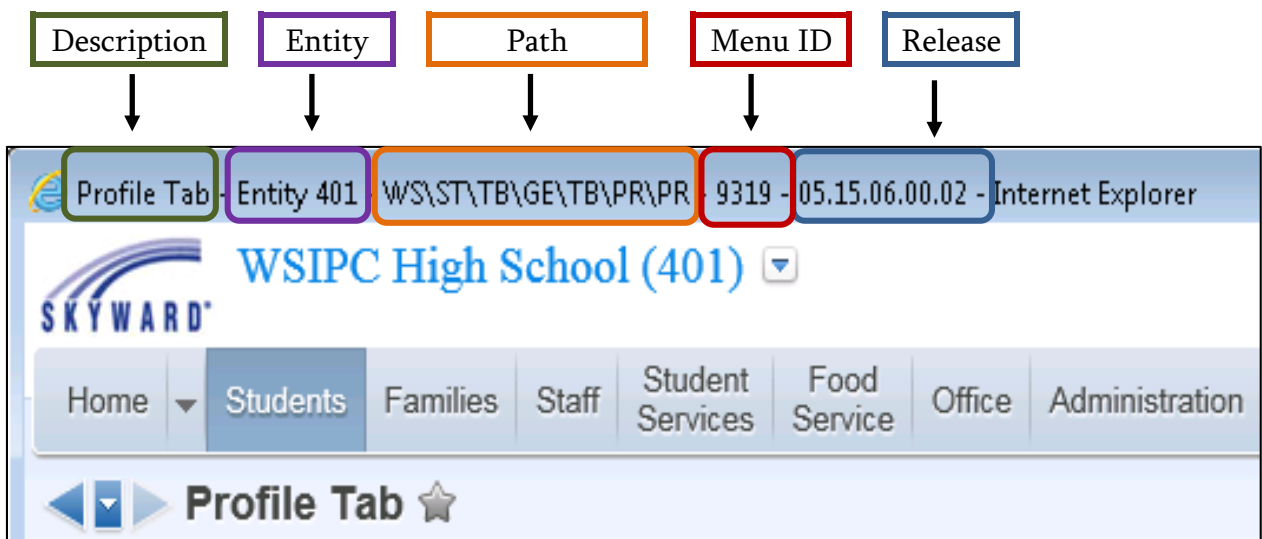


Figure 81 - Display of titles on the screen. The title order is determined by the configuration in the Window Titles area shown in Figure 80.

Viewing Your Login History

Your login history shows the date and time you signed in, which Web browser you used, and other details. Up to 2,000 records can be stored in login history.

To view your login history:

1. Click Account in the upper-right corner of the screen. The Account Information screen appears.
2. Click Login History.

Note The Last Five Logins widget also displays the date, time, and IP address from the last five times you signed in. See “[Adding Widgets](#)” (page 13) to learn how to add the widget to your dashboard.


Using Help

Skyward's School Management System provides a variety of tools that help you use the product, learn more about modules, and find answers to questions.

Accessing the Help Menu

You can quickly access the Help menu from any screen in Skyward's School Management System.

To access the Help menu:

- Click the Help button  in the upper-right corner of the screen.

Using the Help Menu

Once you access the Help menu, you see several help options (Figure 82). Table 13 describes each option.

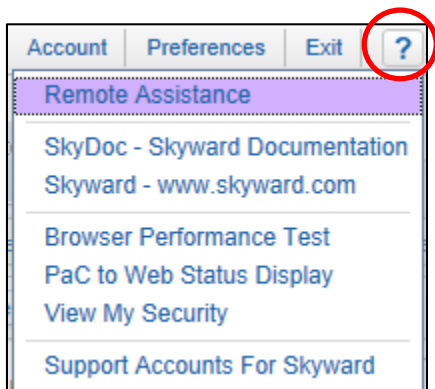


Figure 82 - The Help button provides several help options to assist you in using Skyward's School Management System.


Option	Description
Remote Assistance	Washington State does not use this option.
SkyDoc – Skyward Documentation	Allows you to access the SkyDoc library, which contains information about various processes, reports and utilities. Many SkyDoc library entries offer tutorials that explain a feature’s purpose and how to use it. You can also view WSIPC’s Guides from this area. To learn how to access WSIPC’s Guides, see “ Viewing WSIPC Educational Materials ” below this table.
Skyward – www.skyward.com	Opens a new browser window showing Skyward’s website.
Browser Performance Test	Runs diagnostic testing on your browser that may help your IT department troubleshoot problems with Skyward’s School Management System.
PaC to Web Status Display	Washington State does not use this option.
View My Security	Displays a list of all menu items that you have the security to access, and your security level for each item.
Support Accounts for Skyward	Skyward Support Accounts are used by WSIPC staff to aid in resolving support issues. This menu option is only seen by users who have System Wide Access.

Table 13 - Help menu options

Viewing WSIPC Educational Materials

As mentioned in Table 13, the SkyDoc – Skyward Documentation option allows you to access WSIPC Educational Materials (Figure 83). WSIPC has created many informative Guides to help you learn how to use the modules.

To view WSIPC Educational Materials:

1. Click the Help button. 
2. Click SkyDoc – Skyward Documentation in the menu list.
3. Click the plus sign next to WASHINGTON SCH INFO PROC COOP in the menu on the left side of the screen.
4. Click 00 – WSIPC Educational Materials.
5. In the main screen area, click the title of a product line such as Financial Management, Human Resources, or Student Management.
6. Continue clicking titles to access the WSIPC Educational Materials for a specific module, area, or process.

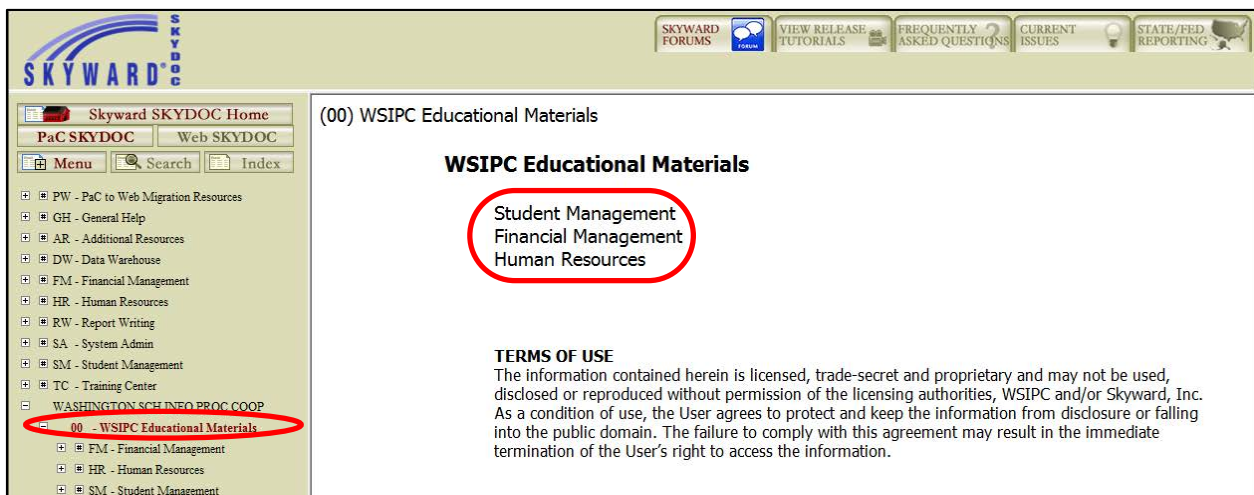



Figure 83 - WSIPC Educational Materials

Viewing Student State Report Descriptions and Specifications

SkyDoc also contains Student State Report examples, descriptions, and specifications that you may find useful (Figure 84).

To view State Report descriptions and specifications:

1. Click the Help button. 
2. Click SkyDoc – Skyward Documentation in the menu list.
3. Click the plus sign next to WASHINGTON SCH INFO PROC COOP in the menu on the left side of the screen.
4. Click WS - Web Student Management.
5. In the main screen area, click Federal/State Reporting.
6. Click Washington State Reports.
7. Click Reports.
8. Click a state report category.

The screenshot displays the Skyward SKYDOC interface. At the top left is the Skyward logo. The top right contains navigation links: SKYWARD FORUMS, VIEW RELEASE TUTORIALS, and KNOWLEDGE BASE. Below the logo is a navigation bar with 'Skyward SKYDOC Home', 'PaC SKYDOC', and 'Web SKYDOC'. A secondary bar includes 'Menu', 'Search', and 'Index'. The left sidebar lists various categories, with 'WS - Web Student Management' circled in red. The main content area is titled '(WS) Web Student Management' and 'View Skyward Documentation'. Under the heading 'Web Student Management', there is a list of links: 'Food Service', 'Office', 'Federal/State Reporting' (circled in red), and 'Student Services'.

Figure 84 - WSIPC State Reporting Materials

Using Paths in WSIPC Product Guides

To perform a task in Skyward's School Management System, you follow a path to get from a general area to a specific area. Therefore, the first step of each procedure in a WSIPC Guide typically contains a menu path. Figure 85 shows an example of a menu path provided in a procedure.

To add an attendance record by date:

1. Go to Student Management\Office\AT\AE.

Figure 85 - An example of the first step of a procedure for adding an Attendance Record by date

To use WSIPC Guides effectively, it's important to understand how to read these paths. Using the example above, this section shows you how to follow a path in a WSIPC Guide.

Selecting a Product Line

Every path begins with the product line name, such as Human Resources or Student Management (Figure 86).

To add an attendance record by date:

1. Go to Student Management\Office\AT\AE.

Figure 86 - The product line name

To select a product line, click the arrow next to the Home button in the upper-left corner of the main screen (Figure 87). In this example, you click Student Management.

Note Family Access and Student Access do not appear in the product line selection area. To learn more about Family Access and Student Access, see the *WSIPC Guide to Family and Student Access for Students and Guardians*.

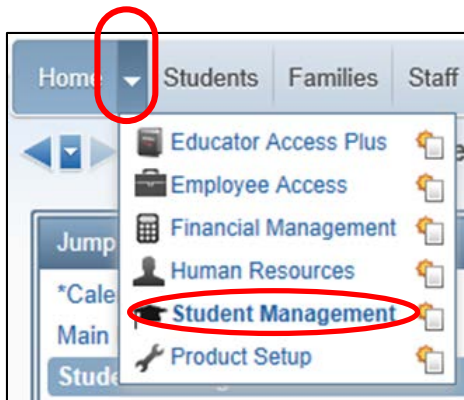


Figure 87 - The Home button arrow is selected, showing product lines

Selecting a Module

After you select a product line, tabs appear that represent modules specific to the product line. In this example you selected the Student Management product line, so tabs related to that product line (such as Students, Families and Office) appear at the top of the screen (Figure 88). Your security level determines which module tabs you see.

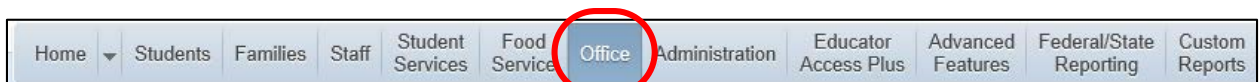


Figure 88 - The tabs that appear at the top of the screen when you select Student Management. The Office tab is highlighted.

The next element of the path is Office, so you click Office (Figure 89).

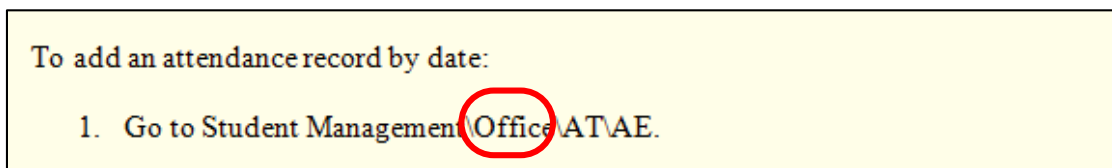


Figure 89 - The element of the path following the product line name

After you click Office, a list of all of the modules related to Office appears (Figure 90). Your security level determines which modules are available to you within each tab.



Figure 90 - Modules related to Office. The Attendance module and its abbreviation (AT) are highlighted.

At this point in the path, a two-letter abbreviation appears (Figure 91). This abbreviation specifies the module. In this case, it's the Attendance module.

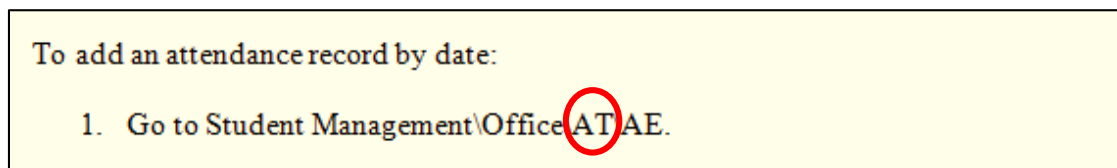


Figure 91 - Two-letter abbreviation specifying the module

Note If abbreviations don't appear next to the module names, see [“Setting Your Preferences”](#) (page 87) to learn how to turn on this feature.

You click the arrow to the left of the Attendance – AT area to expand the module and see its areas (Figure 92).

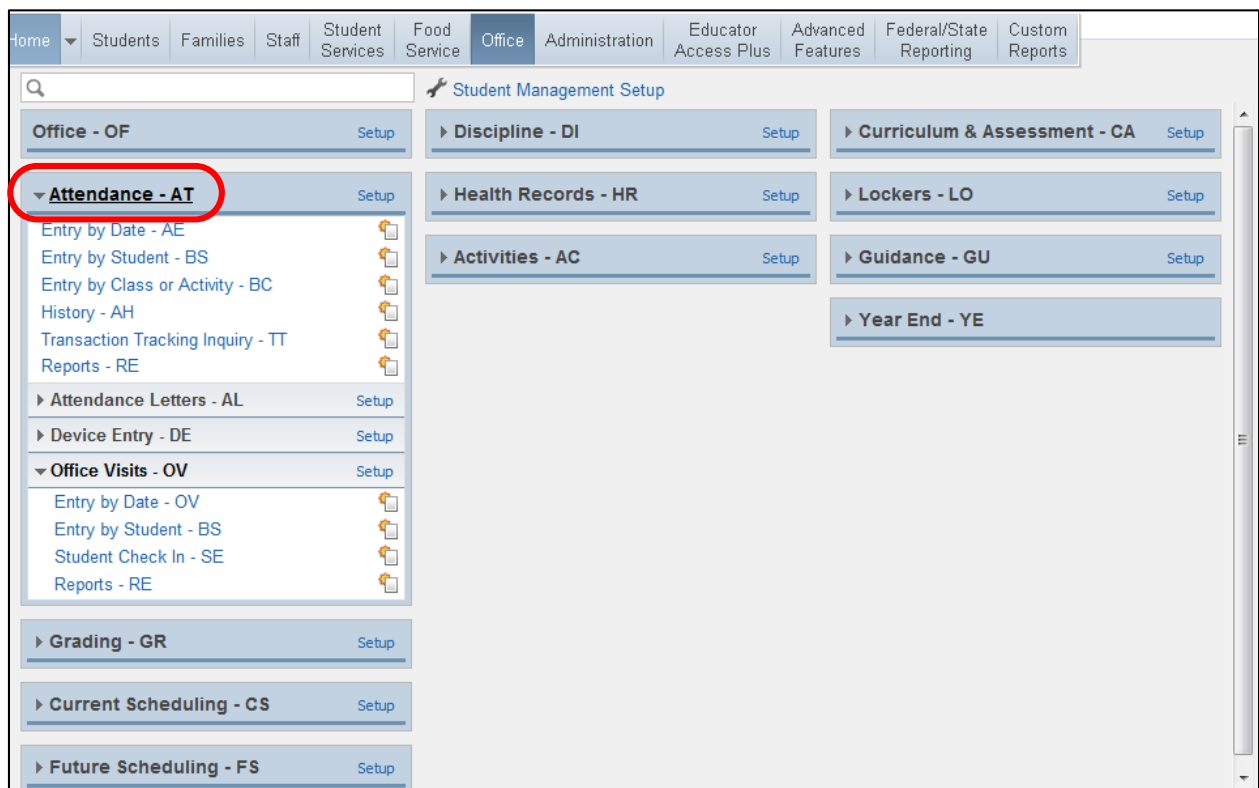


Figure 92 - The Attendance module is expanded to show areas of the module

Selecting a Module Area

The final element in the path is another abbreviation (Figure 93).

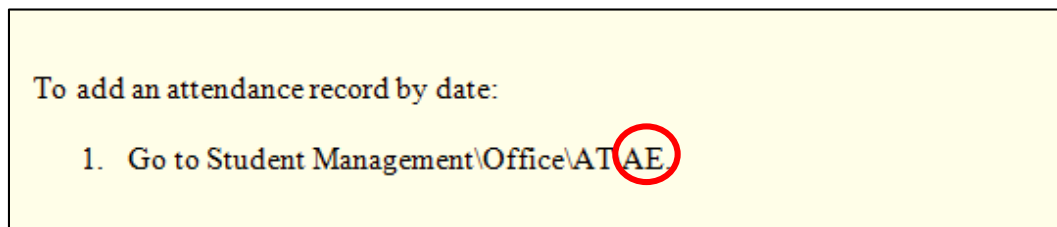


Figure 93 - The final element of the path

This abbreviation specifies the module area where you can add an Attendance Record by date. Notice that Entry by Date – AE is the first area listed under the Attendance module (Figure 94).

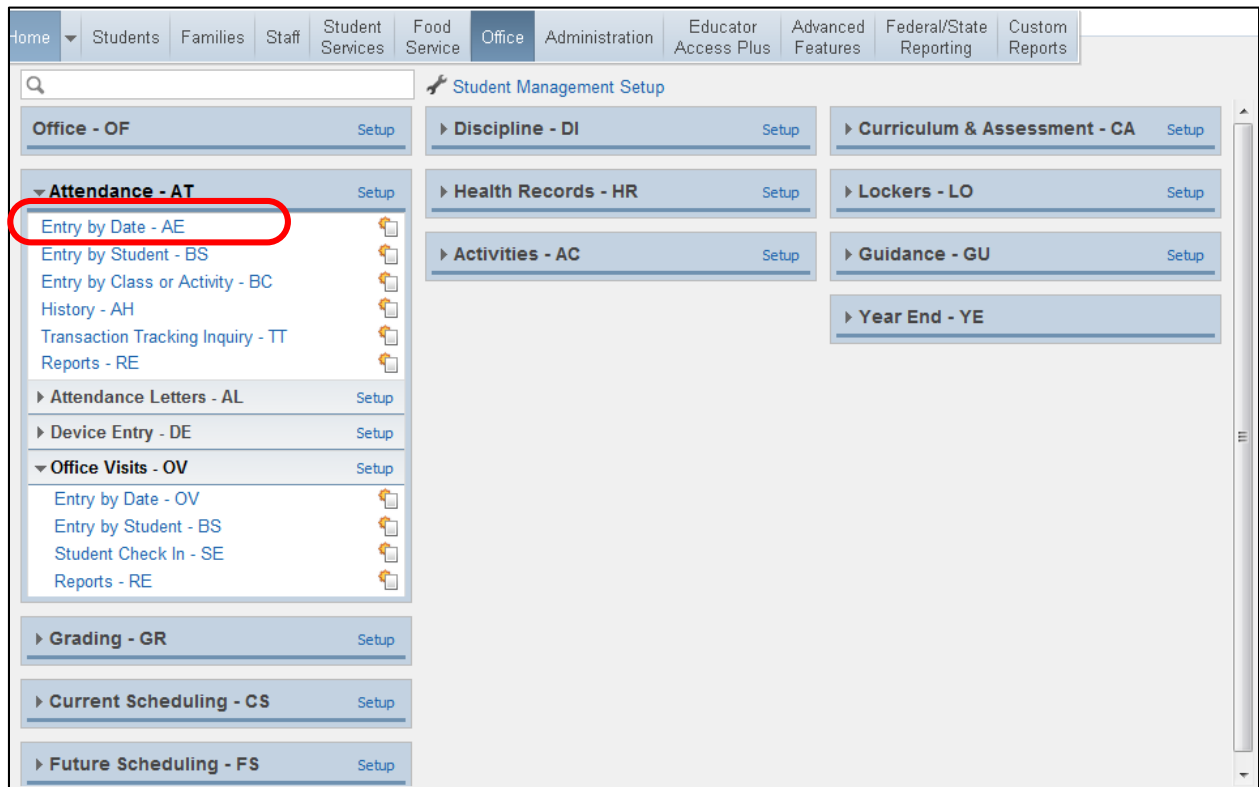


Figure 94 - The Entry by Date area of the Attendance module

Clicking Entry by Date – AE takes you to the screen where you can add an Attendance Entry Record by date (Figure 95).

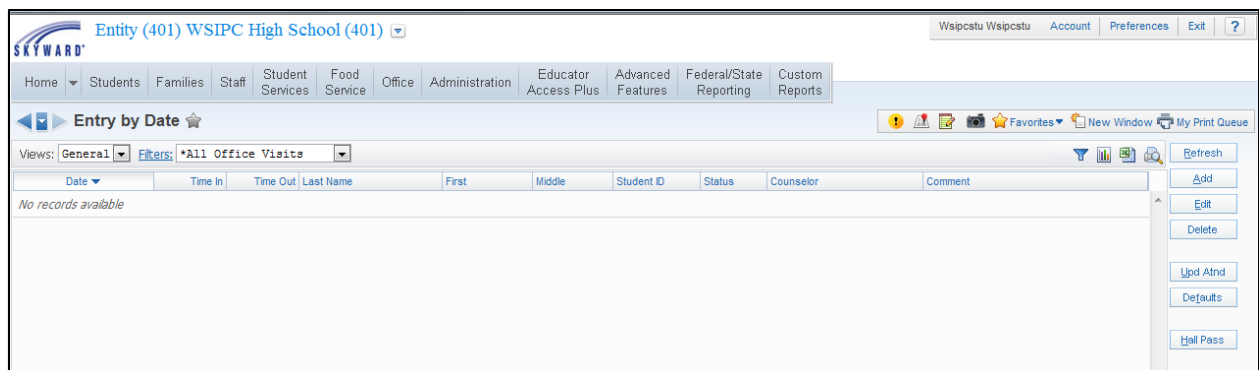


Figure 95 - Attendance Entry by Date screen

Navigating to Setup Options

Setup links allow you to access Codes, Configuration options, and Utilities for modules or areas (Figure 96). When you click the Setup link, the Codes (CO), Configuration (CF), and Utilities (UT) options appear (Figure 96). To learn how to navigate to Setup options, see “[Accessing Setup Options](#)” (page 20).

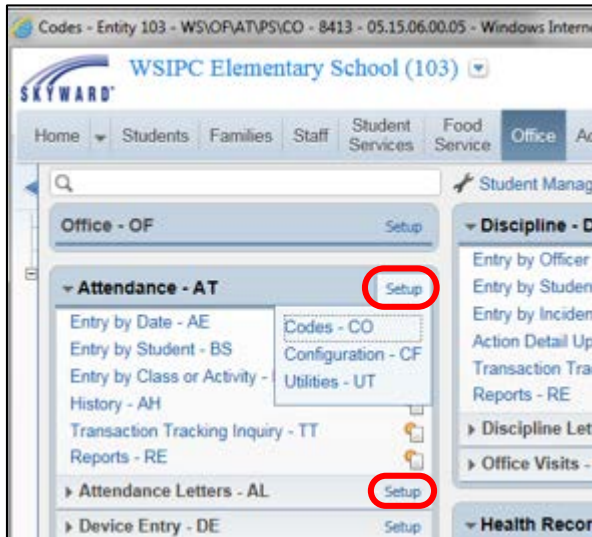


Figure 96 – Setup link for the Attendance module and the Attendance Letters area

Paths to Codes (CO), Configuration (CF), and Utilities (UT) are documented in WSIPC Guides as shown in Figure 97.

1. Go to Student Management\Office\AT Setup\CO\AR.

Figure 97 – A path that contains the Setup element

Appendix A - Keyboard Shortcuts

Reference Chart

This appendix provides a reference of PC keyboard shortcuts that can save you time and effort while navigating through Skyward’s School Management System. Shortcuts used for Macs, troubleshooting, and system analysis are not included in this appendix.

Keyboard Shortcut	Impact or Effect
General	
Tab or Enter	Moves the cursor forward to the next field or button. Enter can be more reliable, but it also has some nuances when it comes to description fields, see “Setting Your Preferences” (page 87) for more details and settings.
Shift+ Tab	Moves cursor back to the previous field or button.
Alt+[Underline Letter of field]	Some field labels have underlined letters. This action places the cursor on that field. Example: Alt+N places the cursor in <u>l</u> nvoice Amount field.
Alt+[Underline Letter of button]	Some buttons have underlined letters. This action performs the same function that occurs if you click the button. Example: Alt+O selects the OK button.
Ctrl+→	Within a field\box, places the cursor at the end of the current string of characters or at the beginning of the next string of characters.
Ctrl+←	Within a field\control box, places the cursor at the beginning of the current string of characters or at the end of the previous string of characters.
→ (in a field)	Advances the cursor to the next character.

Appendix A - Keyboard Shortcuts Reference Chart

Keyboard Shortcut	Impact or Effect
← (in a field)	Retreats the cursor to the previous character.
Home (in a field)	Returns the cursor to the beginning of a line.
End (in a field)	Advances the cursor to the end of a line.
Shift + [any of the previous four keys] (in a field)	Highlights the character string as you perform any of the previous four shortcuts.
Ctrl+C	Copies a selected string of characters.
Ctrl+X	Cuts a selected string of characters.
Ctrl+V	Pastes a previously cut or copied string of characters.
Esc	Closes the screen.
Browse Sections Record must be selected on a Browse screen	
Home	Returns to the first viewable record.
End	Advances to the last viewable record.
Page Up	Retreats to the previous section of viewable records.
Page Down	Advances to the next section of viewable records.
↑	Retreats to the previous record.
↓	Advances to the next record.
Date fields Cursor must be in a date field	
Ctrl+T	Enters today's date.
Check Boxes and Radio Buttons Cursor must be in a check box, radio button, or option button	
Space Bar	Toggles between selecting and clearing the box or button.

Appendix A - Keyboard Shortcuts Reference Chart

Keyboard Shortcut	Impact or Effect
Drop-down Boxes and Menus	
Cursor must be in a drop-down box or menu	
Alt+↓	For drop-down menus (that you can't type in). Displays the drop-down list. Then, you can use the arrow keys, Home, End, Page Up, or Page Down to highlight a value. Click Enter to select the value.
↓	For drop-down boxes (that you can type in). Displays the drop-down list. Then, you can use the arrow keys, Home, End, Page Up, or Page Down to highlight a value. Click Enter to select the value.
Type the first character or value.	Cycles through all listed values with that character as its first character.
Finance-Specific Entry	
1= A= Asset 2= L= Liability 3= Q= Equity 4= R= Revenue 5= E= Expense	When entering an account number into the Account Number Entry screen, a user can choose to type a number for the corresponding account type. This action may reduce data entry time for 10-key entry personnel.

Table 14 - Description of keyboard shortcuts